Alexandria®
Hosted Service

Getting Started Guide

For Macintosh and Windows

Alexandria Hosted Service v6.22.5

COMPanion®

Copyright Notice

© 2004-2014 Evelyn Manufacturing Inc. All Rights Reserved
Distributed under exclusive license by COMPanion Corporation.

This work is protected under the copyright laws of the United States. Any reproduction of this manual or our software, in whole or in part, is not permitted without the proper express written authorization of Evelyn Manufacturing—except in the normal use of the software and as described in the Software License Agreement.

All permitted copies shall contain the same proprietary and copyright notices as were affixed to the original.

The software described in this book is furnished under a licensed agreement and may be used only in accordance with the terms of that agreement.

NOTE: Unauthorized use of this software or related materials can result in civil damages and criminal penalties.

Alexandria Hosted Getting Started Guide
Printed February 27, 2014—v6.22.5
Printed in the United States of America by

COMPanion® Corporation
1831 Fort Union Boulevard
Salt Lake City, Utah 84121-3041 USA
(801) 943-7277 voice, worldwide
(800) 347-6439 voice—Sales, US & Canada
(800) 347-4942 voice—Tech Support, US & Canada
Tech Support, worldwide: *support@companioncorp.com*
(801) 943-7752 FAX, worldwide
Sales: *sales@companioncorp.com*
Web: *http://www.goalexandria.com*

To subscribe to the free Alexandria Discussion Group,
send an email to "l*istmod@companioncorp.com*"
and type "*Subscribe Alex-Net (first name) (last name)*
(collection name) (Alexandria serial number)" in the body of the message.

Or, sign up here:
http://www.goalexandria.com/support/lib_corner/listserv/index.html

Find us on Facebook:
https://www.facebook.com/pages/Alexandria-Library-Management/226663827349071

Follow us on Twitter:
Follow Alexandria Software *@AlexandriaLib*

Alexandria's Online Help:
http://www.companioncorp.com/mediawiki/index.php/Alexandria

Trademarks & Usage Licenses

COMPanion®, Alexandria®, KeepnTrack®, Textbook Tracker® and their associated logos and icons are trademarks of COMPanion Corporation, Evelyn Manufacturing Inc., or Schjelderup LTD used under license by COMPanion Corporation.

Macintosh is a trademark of Apple, Inc.

Windows® is a trademark of Microsoft Corporation.
Other trade names are the property of their respective corporations.

OpenSSL—© 1998-2011 The OpenSSL Project. All rights reserved
This product includes software written by Tim Hudson; *tjh@cryptsoft.com*
This product includes cryptographic software written by Eric Young; *eay@cryptsoft.com*
This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit
http://www.openssl.org/

Select Z39.50 Libraries—© 1995-2005 Index Data.

The VBD C++ classes are copyright © 1997, by Douglas M. Gaer
This software is based in part on the work of the Independent JPEG Group.

expat—© 1998, 1999, 2000 Thai Open Source Software Center Ltd.

libHaru—© 1999-2010 Takeshi Kanno

zlib—© 1995-2009 Jean-loup Gailly and Mark Adler

cURL & libcURL—© 1998 - 2010, Daniel Stenberg, <daniel@haxx.se>, et al.

libpng version—© 1998-2011Glenn Randers-Pehrson

Cairo via MPL / Pixman—© 2008-2011 Red Hat, Inc.

JsonCpp—© 2007-2010 Baptiste Lepilleur

libssh2—© 2004-2009 Sara Golemon, Mikhail Gusarov, The Written Word Inc, Eli Fant, Daniel Stenberg, and Simon Josefsso. All rights reserved.

Table of Contents

Welcome to Alexandria! 1
- The Unparalleled Power of Alexandria! 10
- Communication Ports & Protocols 11
- Notes and Warning Alerts 12

Preparing for Alexandria 13
- Automating Your Library Overview 13
- Barcode Your Collection 14

Setting Up Hosted Service 19
- Hardware and Operating System Recommendations 19

Alexandria Basics 25
- Macintosh & Windows Command Differences 25
- Alexandria Online Help 26
- Help Menu 26
- File Menu 27
- Edit Menu 29
- Show Menu 30
- Tools Menu 31
- Links Menu 32
- Sites Menu (District Librarian only) 33
- Window Menu 33
- Logging In and Activating Security 35
- Web Services and Online Modules 37
- Accessing Alexandria's Web Librarian 38
- Adaptive Dates 39

Site Management Window 41
- What is Site Management? 42
- Site Records List and Associated Tools 46
- Current Record Pane 47
- Current Record Pane (Continued) 48

Introduction to Preferences 51

Administration Settings 57
- Administration: Status Settings 59
- Administration: Email Settings 61
- Email Settings 62
- Using Gmail as Your SMTP Server 64

Security Preferences **65**

Address Book Preferences **73**
Address Books Settings 75
Address Books: Adding, Removing, Editing, and Duplicating 76
Addresses: Adding, Removing, Editing, and Duplicating 81

Localization Preferences **89**
Dates & Currency tab 90
Terminology tab 92
Language tab 94

Calendar Preferences **95**

Policy Preferences **99**
Setting Policies to Achieve Meaningful Statistics 101
Using the Policies Preferences 102
Exceptions Mode 103

Patrons Preferences **111**
Patron Rules tab 112
Patrons Defaults tab 113
Patron Pictures tab 114
Grade Table tab 115

Items Preferences **119**
Cataloging tab 123
Subject Sources tab 125
Cover Art tab 127
Leading Articles tab 129

Barcodes Preferences **131**
Barcodes tab 132

Circulation Preferences **135**
User Interaction tab 136
Circulation Rules tab 139
Receipts tab 142
Letters tab 145
Circulation Settings tab 146

Researcher Preferences **149**
Researcher Overview 151
Researcher tab 153
Interface tab 156

An Introduction to Importing 159
Tab-Delimited Records 161

Importing Patrons & Operators 163
Patron Fields by Field Number 168

Importing Items 171
Item Fields by Field Number 179

Getting Started With Reports 183
The Reports Window In More Detail 183
Report Categories Pane 185
Reports Tools / Search Pane 186
Report Selection Pane 189
Selected Report Pane 191
Overview tab 192
Selection tab 193
Sites tab (Distributed Union) 195
Schedule tab 196
Locations tab 198
In Conclusion 200

Getting Started With Utilities 209
The Utilities Window In More Detail 209
Utility Category Filters 211
Utilities Tools / Search Pane 211
Utility Selection Pane 212
Selected Utility Pane 212
Performing Utilities 213
In Conclusion 213
Moving Patrons to a New Policy 214
Moving Items to a New Policy 216

Operation Management 217

Circulation Window 223
Modes, Commands and Help 224
Current Patron and Current Item Information 225
Circulation Window Tabs 226
Using the Circulation Window 227
Using the Actions Menu 228
System Patrons 230
Offline Mode 232

Circulation Commands 235
Circulation Command Basics: 235
Make an Item or Patron Current 235
Check Out (.) 236
Set Override Due Dates 238
Bookdrop Mode (B) 239

Additional Circulation Commands 240
Locate a Patron by Last Name (L) 240
Locate an Item by Title (T) 240
Placing a Hold Request on a Title (H) 241
Place a Forward Reservation on a Specific Copy (G) 242
Renewing An Item (QE, R, or RA) 244
Renewing an Item 245
Renew All Items 245
Special Circulation Commands 247
Charging a Fee (F) 247
Declaring a Copy Lost 248
Checking Items Out To the Discarded Copies System Patron 249

Item Management 251
About MARC records 251
Item Management Window 252
The Item Management Window In More Detail 253
Current Item Record Pane 254
Current Record Tabs and Subtabs 256
Finding Items 257
Adding Titles and Copies 258
Duplicating Titles or Copies 261
Modifying Titles and Copies 264
Removing Titles and Copies 266
Title, Author, and Subject MARC Editor 268

Patron Management 271
Patron Records List and Associated Tools 272
Current Patron Record Pane 273
Alexandria Operators 275
Duplicating Operators 280
Modifying Operators 281
Removing Operators 283
Alexandria Patrons 284
Duplicating Patrons 286
Modifying Patrons 287
Removing Patrons 288
Adding Patron or Operator Pictures 289
How to Find Patrons and Operators 290
Accessing the Online Patron Management Window 292
Bookmarking Online Interfaces 292

Shortcut Keys 293
Accelerator and Hotkey Commands 293
Windows Shortcut Keys 293
Windows Circulation Shortcut Commands 294
Macintosh Shortcut Keys 295
Macintosh Circulation Shortcut Commands 296

Welcome to Alexandria!

Alexandria® Hosted Service

A Note About the *Getting Started Guide:*
Much effort was dedicated to produce a guide for a program that will unequivocally change after release. At the time this guide was completed, all of the information contained within was as accurate as possible. However, software such as Alexandria continuously evolves through patches and updates designed to improve the experience for all users. This means that some of the data contained in this guide may be outdated at some point in the future, *especially* where it concerns online features and functionality relating to it. However, when changes *do* inevitably happen, we provide additional dynamic assistance through our technical support and online help channels; *www.companioncorp.com/mediawiki/index.php*.

Welcome to the family!

Congratulations on selecting **Alexandria hosted service** as the information management system for your library. Alexandria is a powerful application that helps you to manage your assets and allows your patrons to fully access your library's resources.

The *Alexandria Getting Started Guide* is divided into sections that correspond to the major areas of the program, providing you with sequential, step-by-step instructions for configuring Alexandria's preferences and beyond. Our goal is to take you from your initial setup to the eventual circulation of items, assisting you in taking your very first steps with us.

By reading this guide in its entirety *(no skimping!)*, you will gain the insight required to run Alexandria, and thus, your library, more efficiently. You can also find an electronic version of this guide on the installation CD-ROM or as a downloadable `.pdf` from our website:

`www.goalexandria.com`.

So, let's begin!

The Alexandria library automation system consists of a main information server called the **Data Station**, hosted directly at one of our private, first-class, data network facilities. The Data Station is home to the **Data** folder, where all your crucial patron, item, and library system information (data) is saved; it also processes all the activities and command requests from networked client **Workstations**.

The Data Station is hosted on a secure, access-restricted machines that are protected by battery backup, housed in a climate-controlled environment, and connected to the internet via a 100MB (minimum) fiber-optic connection. All services are monitored electronically by certified professionals 24/7, so if a problem *does* occur, it can be addressed immediately. Equipment modification and upgrades are completed swiftly and scheduled during off-hours and low-use periods—at no cost to you!

COMPanion stores and maintains your data on hardware that is configured with hard disk drives in a robust RAID array; in the event of hard drive failure, service will *not* be interrupted. All data is backed up daily and stored on COMPanion servers, with an additional daily backup stored securely off-site at a separate data network facility. Daily backup data is kept for seven (7) days as part of the dedicated **Hosting Service Agreement**.

Your **Data** folder *cannot* be accessed outside of COMPanion's hosted services. However, for a nominal fee, a DVD-based hard copy of your data may be obtained for safekeeping and is offered by COMPanion as an additional measure of protection and peace of mind.

In the unlikely event that your data needs to be restored from a backup, COMPanion will perform that service at no additional charge as quickly as possible.

COMPanion respects your hosted data as confidential and *will never* distribute any of your data's contents to a third party without prior written authorization. Any authorized third party with whom COMPanion does business would guarantee the same expectation of confidentiality.

If you would like to order a DVD-based backup of your data, contact your sales representative at *(800) 341-6439* for information and pricing.

If you've already licensed use of COMPanion's hosted service and have questions or problems during installation, contact COMPanion's 24-hour Technical Support Service at *(800) 347-4942* or by email.

Alexandria offers a variety of expanded modules and client programs that can communicate with and access the information on your hosted Data Station to perform specific library functions—your license determines which clients and modules you can use. Modules and clients are available for both the Macintosh and Windows operating systems and are detailed on the subsequent pages.

Alexandria Configurations

- **Hosted** databases are housed directly at one of our private, first-class, data network facilities on secure, access-restricted machines that are protected by battery backup, housed in a climate-controlled environment, and connected to the internet via a 100MB (minimum) fiber-optic connection. Hosted servers that store library data are maintained on hardware that is configured with hard disk drives in a RAID array; in the event of hard drive failure, service will not be interrupted. All data is backed up daily and stored on COMPanion servers, with an additional daily backup stored securely off-site at a separate data network facility. All services are monitored electronically by certified professionals 24/7, so if a problem does occur, it can be addressed quickly. Equipment modification and upgrades are completed swiftly and scheduled during off-hours and low-use periods.

- **Controller (MDS)** allows you to house multiple Data Stations on a single, centralized server. Essentially, when your data is hosted by COMPanion, it's already running through a Controller, which saves not only time, but money. The Controller gives administrators in a group of sites the ability to share resources with each other (i.e. other Alexandria libraries), yet still direct and control their own collections independently. Alexandria Controller can update and archive all of the databases at once to a single location. Not only does this configuration make life easier for your information technology (IT) staff, it saves travel time as well, and gives librarians the autonomy to manage their own records and policies. Patrons have the ability to either search an individual library, a group of libraries, or all libraries at once. Alexandria's advanced search capabilities allow libraries to simultaneously access *all* collections in real-time. Each library can choose an appropriate license level for their patron base and anticipated usage. Each library maintains control over policies, preferences and cataloging.

- **Central Union** houses many library collections in a singular **Data** folder stored on a central Data Station. This gives management control to a sole administrator; all updates, upgrades, data backups, and other management procedures are performed for the *entire district* at a centralized location. Even though all your data is centralized on a main server, patrons have the ability to search an individual library, a group of libraries, or the entire district at once—*in real-time!* Since there is only one central patron database, Central Union allows the most convenient access to inter-library loans (**ILL**). Those considering Central Union should plan to address overlapping barcode ranges, policies, preferences and cataloging. When considering add-on features, all libraries must subscribe to the same services. For more information on "Central Union" and what is affected by it, please consult Alexandria's On-Line Help.

- **Distributed Union (WAN)** gives librarians in a group of sites the ability to share resources with each other, yet still manage and control their own collections independently. **Data** folders are housed on separate Data Stations in each library, or at a "server farm" in a central location. Patrons have the ability to either search an individual library, a group of libraries, or the entire district at once. Alexandria's advanced search features allow libraries to simultaneously access all collections in real-time. Each library can choose an appropriate license level for their patron base and anticipated usage. Each library maintains control over policies, preferences and cataloging.

Alexandria Options

The following are stand-alone features that allow you to accomplish anything from SIS automation, to enhancing your collection with Lexiles, or adding an Alexandria search widget to any given web page.

- **SIF** ensures that K-12 instructional and administrative software applications work together more effectively. SIF is an industry-supported blueprint that enables diverse applications to interact and share data seamlessly. SIF reduces the redundancy of data entry and allows data to be efficiently exchanged among different applications using a standard set of specifications.
- **SIP2** allows you to utilize SIP2 hardware (e.g. Checkpoint, 3M, etc.) by supporting the SIP2 protocol; this makes your library more efficient by enhancing your inventory and security features. SIP2 also allows you to empower your patrons with self-service check-in and -out modes, allowing you more time to focus on patron information needs. Although mainly designed for self-service check-out stations, OverDrive, Axis 360, and MackinVIA all use a subset of SIP2 in order to communicate with Alexandria whether it be requesting patron status information or downloading MARC files to automatically import into your database.
- **Lexile** is a scientifically-based reading measurement that can be used to match a patron's reading ability to the overall difficulty of a specified text. This module provides educators with a standardized system of measurement, allowing them to better monitor the reading progress of their students. Lexiles have become the most widely-accepted reading measurement in use today; renown as the most accurate way of matching readers to suitable text.
- **Advanced Bookings** provide a valuable extension to the reservation capabilities that come standard with Alexandria. This useful module streamlines the management of centralized media centers that process numerous requests each day.
- **Search Widget** allows you to draw attention to your catalog and invites patrons to search your catalog directly from your school or library's main home page. Depending on your needs (and preferences), you can implement a **Simple** or **Advanced** search widget.

Additional Features

These are now standard features in *most* non-Central Union Alexandria licenses.

- **Alexandria WAN** (wide area network) allows you to access library collections on other Data Stations connected to your network.
- **Alexandria Web Router** is an efficient and secure solution to manage the web access and interface of multiple library collections. Web Router enables administrators to limit access to a single machine or IP address as the web access point for multiple Data Stations.
- **Z39.50 Services** allow patrons to search numerous collections simultaneously, enhancing research, reference, and much more. You can access public libraries, academic libraries, and other collections using an extremely friendly, built-in server/client interface. With Z39.50, it's easy to share your own resources with others in your district (or community) and allow patrons to access your data from community locations running Z39.50 clients. Special considerations apply when running multiple Z39.50 servers from multiple hosted Data Stations in a single IP environment; contact COMPanion's 24-hour Technical Support Service at *(800) 347-4942* or *(801) 943-7277* for more information.
- **Alexandria Explore** provides a powerful graphical interface to your Alexandria collection. The interface uses pictures and icons to help patrons, who do not yet read proficiently, find what they need in your collection.

Third-Party Enrichment

These optional services are managed by our third party partners and come integrated with Alexandria to enrich the content and resource offerings of your collection with summaries, awards, reviews, related items of interest, etcetera.

- **NoveList** is a fully-integrated reader-advisory service that helps to enrich your Alexandria search results by offering related reading recommendations, similar authors, articles, and more! Your patrons can easily access additional content as they search, which leads to increased library circulation and awareness of available materials directly related to their personal interests.
- **netTrekker Search**, unlike ordinary search engines, contains *only* academic-focused websites that are organized around K-12 curricula. A team of 400 educators and librarians evaluate websites for academic integrity and age appropriateness before they are considered for inclusion in netTrekker. Using netTrekker, students can safely search the internet for school projects and get high-quality, contextual results every time. netTrekker Search provides a complete K-12 academic search tool for your entire district with content customized for Elementary (K-5) or Secondary (6-12).
- **Sneak Peek** users will enjoy title reviews, summaries, and cover art straight from Alexandria's search interfaces. Hyperlinks connect patrons to this resource, displayed within your chosen web browser. Alexandria Sneak Peek offers a wealth of descriptive information and cover images relating to all types of books, from juvenile chapter books to conference proceedings. Various elements of content are added to update this information on a weekly basis. With Sneak Peek, you'll have access to more than 1.5 million ISBNs all with associated data elements.
- **Soundzabound** is the only subscription service that specializes in royalty-free music and audio-clips which meets all of the licensing and technology requirements necessary for education! The Soundzabound audio library offers a wide variety of music, audio themes and sound effects for grades K-12 and universities—all royalty-free to ensure your copyright safety. Perfect for podcasts, PowerPoint™, videos, news shows, video yearbooks, digital storytelling, presentations, TV broadcasts, web design and more!
- **SAFARI Montage** is a provider of on-demand internet streaming media for K-12 schools, facilitating visual instruction and learning in the classroom and providing educators and administrators the ability to manage a single interface for accessing visual resources from inside the school or from home.
- **Capstone Publishers** allows you to authenticate and access your Capstone Publishers online account using a single sign-on solution, whereby you can link directly to the Capstone Publishers online book ordering system and start shopping immediately.
- **Mackin** allows you to export your data in MARC format and automatically upload to Mackin's website for review.
- **Baker & Taylor** allows you to export your data in MARC format and upload it to Baker & Taylor's website for review.
- **Bound to Stay Bound** specializes in providing your library with some of the best children's books, media products, and related services available.
- **Perma-Bound** allows you to export your data in MARC format and automatically upload it to Perma-Bound's website for review.

Third-Party eBook Systems Integration

These optional extras stand apart in a class all their own and for one big reason: eBooks! While the functionality and integration for each of our third-party partners varies slightly, they were all designed to make it easier for libraries to locate, use, and manage eBooks.

Depending on the service(s) you select, Alexandria may share patron status information, automatically retrieve MARC record updates, show real-time availability, support single sign-in, and even assist in the purchasing of new eBooks—all huge conveniences for patrons and librarians alike.

- **OverDrive** is the worldwide leader and full-service digital distributor of eBooks, audiobooks, music, and video. They deliver secure management, DRM-protection, and download fulfillment services for publishers, libraries, schools, and retailers.
- **TABvue** specializes in providing eBooks from an actively growing consortium of publishers that can be fully previewed, purchased, and read online in your default browser without special software requirements. Once a TABvue account has been created and electronic resources purchased, they can be instantly accessed and enjoyed by any number of patrons.
- **MackinVIA** is a complete electronic resource management system providing easy access to eBooks and educational databases. With just one login, users can view, utilize, and manage all of their electronic resources. MackinVIA allows simultaneous, unlimited access to multiple users and is mobile friendly.
- **Axis 360** is Baker & Taylor's revolutionary digital media library, providing libraries with a state-of-the-art system for circulating digital books and audiobooks.
- **Capstone Interactive** makes it easier than ever before to add interactive eBooks to your library collection. Capstone Interactive Library eBooks provide text highlighting, audio support, smart search options, and educator support. Capstone Interactive items are displayed more prominently and authentication from Alexandria is more automatic.
- **Capstone PebbleGo** is an innovative K-3 database from Capstone Press that can be conveniently integrated within Alexandria's Researcher, taking multimodal learning to the next step by making research and literacy accessible for even the youngest of students.

Alexandria Clients

- **Alexandria Librarian Workstation** is used by the operator to perform library functions such as circulation, cataloging and all other administrative functions; since Librarian Workstations are synchronized with the hosted Data Station, using them is your only option. Keep in mind that you may use as many Librarian Workstation clients as your license permits—but you will always only have *one* hosted Data Station.
- **Alexandria Web Librarian** when licensed, is used to perform all the same functions as a Librarian Workstation, only using a standard *world wide web* browser such as Mozilla's Firefox, Apple's Safari, Google's Chrome, or Microsoft's Internet Explorer.
- **Alexandria District Librarian** has all the functionality of a single-user Alexandria license plus the ability to access and modify *any* **Site** in the **District Address Book**, which, once licensed, will appear in the **System Preference Address Books** window. This option is most beneficial to **District Administrator** operators who govern multiple libraries.

Search Interfaces

- **Alexandria Researcher** is used by patrons to access and search your library collection(s) and place holds and reservations on the items that they discover in your catalog. All this is done on-line using a standard *world wide web* browser such as Firefox, Safari, Chrome, or Internet Explorer. The Researcher can also be accessed on iPads and other portable devices.
- **Scout** is a *super* simple, supplementary search interface, conceptualized to stand out both in design and functionality. Children are able to find records in Scout that they may have struggled locating in the Researcher interface; if a child can type, they can search. Designed with touch interfaces in mind, Scout is a perfect interface for tablets such as the iPad. Having very few features and controls—and no preferences—people of all ages benefit from and enjoy using Scout.
- **Self-Service** kiosks (unattended) allow patrons to perform their own bookdrop and checkout transactions, freeing librarians to take care of other library responsibilities—a convenient feature that an overwhelming majority of libraries now happily implement and support.
- **Alexandria Mobile** is a free search interface that allows patrons, librarians, and teachers to quickly browse library collections on-the-go, anytime, from iOS or other mobile devices. Patrons can locate learning resources anytime they need, even at home after the end of the school day; librarians and teachers can navigate the collection in order to plan lessons, assignments and activities.

Hardware & Accessories

We offer the finest barcode readers, labels, backup solutions, power supplies, and more—all designed to work seamlessly with our software products. We also offer photo-composed and laser-printed labels. If you are interested in any of our hardware products or accessories, please contact one of our sales representatives at *(800) 347-6439*.

- **Scanners**—Our high-performance, wireless barcode scanners come pre-configured for Alexandria and give you the freedom to roam while staying connected. They incorporate advanced LED technology that combines bright, sharp aiming lines with high resolution imaging, enabling you to read barcodes quickly and accurately without touching the label; great for library situations where the convenience of a wireless hand-held scanner is required.
- **Receipt & Slip Printers**—Keep patrons informed of their due dates, fines, payments, holds, reservations, and other transactions with our Receipt and Slip printers. Our printers are small, fast, and functional. Designed for everyday use, they offer clean, quiet, high-speed thermal printing capable of producing over 40 receipt styles and sizes.
- **Cash Drawer**—Designed to function with COMPanion's slip printer hardware, the cash drawer (with removable till compartment) is programmed to automatically open after specific transaction events.
- **Labels**—We offer both standard and high-quality labels. Standard labels are created using a printing process that places the ink on top of the label; we recommend label protectors for this option. Our high-quality, long-lasting labels are made using a photographic process that makes the barcode image an integral part of the label; we also offer high-quality lamination and adhesives for this option to increase durability.

The Unparalleled Power of Alexandria!

Alexandria contains several advanced technologies. Although it's not necessary to understand how Alexandria does what it does, this section is for the technical person who wants to know more about the inner workings of Alexandria.

Alexandria is built on top of a proprietary cross-platform (Windows and Macintosh) development system designed specifically for Alexandria. The core components of this system consist of the following unique technologies:

- The operating system acts as the multi-threaded scheduling system that manages all the executable components of the program; however, messages for our threads are prioritized and queued automatically by our software.
- A powerful communications system supports TCP/IP communications protocols and addressing. This system can handle thousands of simultaneous messages. All messages are compressed for communications confidentiality. Only authorized messages are processed by the system.
- An integrated web server provides many researcher options via standard web browsers across all platforms that support web protocols.
- A powerful database engine optimized for storing and accessing library information. Saved data is obfuscated for added data security. The database is *very* high performance—on an older processor with a standard disk drive, it can fully catalog up to 15-35 MARC records per second.
- A class library for developing cross-platform human interfaces.
- A proprietary toolbox of code used by all subsystems.
- A fully-distributed transaction-based client/server architecture. The hosted server (Data Station) processes requests from all clients. Only information necessary for processing is moved between clients and the hosted Data Station. This places very low demands on overloaded networks.

Communication Ports & Protocols

There are a number of ports you are required to open in order to successfully use Alexandria:

Librarian Workstation clients contact your hosted Alexandria Data Station (sometimes referred to as the server) through **Port 30427**.

Your Librarian Workstation clients need to have **Port 80** open in order to communicate.

Z39.50 queries (i.e. MARC record queries) use **Port 210**, **Port 2200** and **Port 7090**. Whatever computer is being used to catalog books using a Z39.50 server needs these ports open. The Z39.50 search originates from the machine doing the search; when a record is saved, it is sent to the Data Station over **Port 30427**. The vast majority of servers use **Port 210**, some use **Port 2200**, and the Library of Congress uses **Port 7090**.

Alexandria Workstations communicate with the hosted Alexandria Data Station using TCP/IP protocols.

A fixed TCP/IP address for each hosted Alexandria Data Station will be provided to you and can *not* be changed or dynamically allocated.

- **TCP/IP** (**T**ransmission **C**ontrol **P**rotocol/**I**nternet **P**rotocol) is the protocol used for the internet and is supported as part of the basic operating systems for both Macintosh and Windows.

When you license Alexandria's hosted services, you'll be provided with a completely comprehensive *"alexhost.companioncorp.com"* URL. You won't need to worry about setting up the server IP address during the installation process because, if the steps are followed correctly, the client will connect to the hosted Data Station and acquire the appropriate IP/DNS. However, you *will* need this IP/DNS to access your Researcher.

Although the hosted Data Station has a fixed TCP/IP address, COMPanion allows users to choose whatever **D**omain **N**ame **S**ystem (DNS) they desire; this can be changed at will without users having to worry about the server's IP address being changed, lost, or forgotten.

Notes and Warning Alerts

- NOTE-

Look for a box like this for special notes or comments that should be carefully examined by the user!

- WARNING-

Look for a box like this for warning messages or important comments that should *not* be ignored!

- HOST-IT-NOTE-

Boxes like this contain special notes concerning your hosted environment.

Preparing for Alexandria

This chapter provides an overview on how to prepare for the automation of your library collection.

To better comprehend how Alexandria works, we recommend that you have the software up and running as you follow the steps provided in this *Getting Started Guide*.

- HOST-IT-NOTE -
In case you were wondering, backing up your data isn't necessary for hosted users and is, therefore, not an option.

Automating Your Library Overview

Use the following steps (and referenced pages) to prepare your library for automation with Alexandria:

Step 1. Develop strategies for item/patron importation; *see page 14*.

Step 2. Barcode your collection; *see page 14*.

Step 3. Setup the Alexandria hosted service; *see page 19*.

Step 4. Configure your **Administration Email** settings; *see page 57*.

Step 5. Create your system operators and assign them **Site Access** and a **Security Group**; *see page 279*.

Step 6. Configure what COMPanion considers to be your essential site and system **Preferences**; *documented here on pages 51 through 149*.

Step 7. Add your item and patron information; *see page 159*.

NOTE:
Alexandria's **Archive Utilities** *do not* substitute for a proper backup!

Barcode Your Collection

Each item and patron in your library is assigned a unique number that Alexandria uses for identification. These numbers appear as barcode numbers on library items and patron library cards.

A typical barcode label consists of three pieces of information:

- The name of the library, school, or company.
- The barcode, usually printed in the middle of the label.
- The barcode number written in numerals at the bottom of the label.

A barcode can be read quickly by powerful, low-cost scanning devices that you can purchase from COMPanion. Using a barcode reader makes your job easier and reduces the chance for errors. If you don't have a scanner, you can type the user-readable number in the command line.

The format of the barcode is called its *symbology*. The symbology COMPanion uses, Code 39 (also known as Code 3 of 9), is the industry standard for industrial and commercial applications—including libraries. This symbology provides a high level of data security with error rates between 1 in 3 million and 1 in 70 million characters scanned. Code 39 does not require a check character in normal commercial and industrial applications. It is also bi-directional, which means it can be scanned from left to right or from right to left.

You will need barcode labels on all of the items in your library that are to be managed with Alexandria. You may also want to barcode objects such as audio-visual equipment, computers, desks, and tables, so you can use Alexandria to inventory these items.

You can also keep temporary item records such as magazines and newspapers. Temporary items can be assigned a barcode number and then circulated like permanent items. A barcode number is assigned to a temporary item only while it's checked out.

Guidelines for Choosing Barcode Numbers

You can set up barcode numbers (according to your needs) using up to fifteen digits. The following are general guidelines for determining your barcode numbering:

- Use the same number of digits for items and patrons.
- Consider using an employee ID or student number for patron barcodes (be sure employee IDs or student numbers do not coincide with item numbers).
- If you have more than one library in your system, use a unique barcode numbering scheme for each library's collection. This will make it easier to manage a central catalog with holdings from all libraries within the system. If items are moved between collections, the barcodes will remain unique and do not interfere with existing item barcodes.
- Use the simplest numbering scheme possible that still meets your needs.

Sample Barcode Numbering Scheme

The following is a sample library barcode numbering scheme. This scheme supports management of up to 899 libraries with each library having up to 300,000 patrons and 700,000 items. You can vary this scheme to handle more libraries, groups within a library, or independent items.

> **- NOTE -**
>
> It is recommended that you avoid starting barcodes with zero ("0") as the first digit. Barcodes can contain letters and numbers; spaces and punctuation are *not* allowed.

This sample scheme uses a 9-digit barcode number for items and patrons.

- **Digits 1 to 3** identify the library. For example, 100 is Eastside Library, 200 is Westside Library, and so forth.

  You can use the three digits within this group to further breakdown the libraries. For example:

  110 — Eastside Elementary School's library
  130 — Eastside Middle School's library
  150 — Eastside High School's library
  210 — Westside Elementary School's library
  230 — Westside Middle School's library
  ...and so on

  If you have more than one library in your system, using unique barcodes for each library's collection makes it easier to manage a central catalog with holdings from all libraries in the district. All barcodes are unique and do not interfere with barcodes for existing items.

- **Digit 4** can tie a barcode to a patron group such as students or staff, to a medium type or vendor, or to an item group such as fiction or reference. For example, if you use 0 through 2 for patrons and 3 through 9 for items, you will have unique barcode numbers for 3 patron groups and 7 item groups.

- **Digits 5 through 9** identify the individual patrons or items in the group.

Using the above scheme, you would have barcodes similar to the following. The bold digits identify the library, the underlined digit identifies the patron or item group, and the remaining digits identify the particular patron or item.

110 2 00361 **110** identifies the library

2 identifies the patron or item group

00361 is the specific patron or item's number

If you have a smaller number of patrons, you can choose a simpler code with fewer digits. The main objective is to keep the number of digits the same for items and patrons to ensure that each library in a district has a unique range of barcode numbers and to use the most straightforward numbering scheme as possible, while still meeting your needs.

NOTE:

The spaces between numbers in the barcode example to the left are for readability.

The actual barcode would be entered as:
110200361

Classes of Barcode Labels

There are two classes of barcode label.

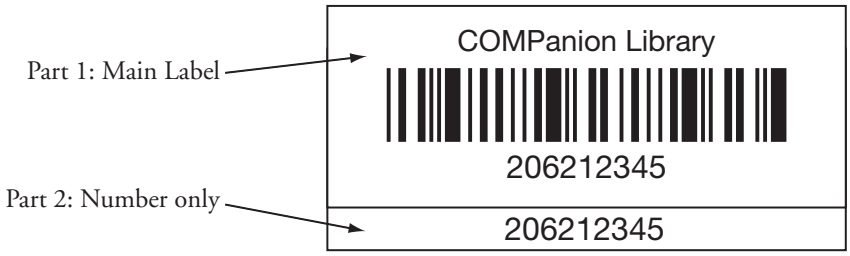
- **Photocomposed labels** are made using a photographic process to create high-quality, long-lasting labels. Rather than printing ink on paper, the photocomposed process makes the barcode image an integral part of the label. These labels usually come with high-quality lamination and adhesives that make them durable and easy to attach. You should use photocomposed labels on all permanent items.
- **Printed labels** are made using a printing process that places the ink on top of the label. These labels require protection of some kind to keep the ink from rubbing off; a layer of transparent Mylar can be placed on these to extend their lives. Although the cost of these labels is less than photocomposed labels, the protection and labor they require can cause them, in some cases, to cost more. Printed labels without extra protection are most cost-effective when printed by you in your library and used for temporary items such as magazines and newspapers.

One and Two-Part Labels

You can purchase either one or two-part barcode labels, depending on how you plan to use them. One-part labels include the library name, barcode, and written barcode number.

If you want to place a barcode label in two different locations on an item, you can order two copies of these one-part labels.

Two-part labels include the same information as the one-part label. The two-part labels also include a second portion on the label, which display the written barcode number.



The second part of the label is useful to attach to a shelf list card or to place on the book in a different location than the upper portion.

Two-part labels provide the benefit of having two labels for each item, at a lower overall cost.

Where to Place Barcode Labels

You can place barcode labels on the inside or outside of items. A label on the outside is easy to locate, but is subject to much greater wear and tear, therefore shortening its lifespan.

Most Alexandria users place their labels on the inside back cover of books and on the outside of items such as records, tapes and CDs.

If you plan to place barcode labels under a transparent jacket cover, test your barcode reader to make sure it can read the labels through the jacket cover.

Placing barcodes vertically on the back cover next to the spine can make inventory easier since you wouldn't need to fully remove the books from the shelf to scan them with a barcode reader.

When to Label Items

You can label items either before or after you enter your item information.

For an existing library collection, it's usually easier to purchase your barcode labels early and place them on items before the item information is entered into the computer. Use two-part labels for this method. As you place the barcode on the item, place the second label on the shelf list card that will be used for entering item data into the computer.

If you are starting a new library, be sure to purchase bibliographic information for your items in a computer-readable format (MARC or MicroLIF). Either order your books with barcode labels attached, or tell your supplier which numbers to assign (in the MARC/MicroLIF records). Have the numbers assigned in call number order so it's easy for you to locate the item for each barcode label you have to apply.

Barcode Readers

Your computer requires a special device designed to read a barcode number and enter the corresponding value into the computer. This device is called a *barcode reader* or *scanner*.

There are a number of different types of barcode readers available, including light-pen readers, laser readers and portable readers. The device you choose depends on your budget and the library's requirements.

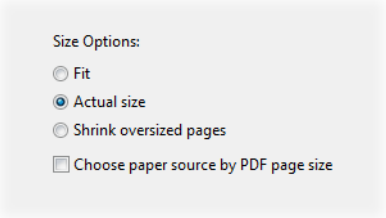
Wand or pen-type readers are the least expensive devices for reading barcodes. CCD wedge or laser scanners are more expensive but do a better job reading the labels (especially in those hard-to-reach item places).

Portable readers give you the freedom of going to your bookshelves to scan labels, rather than having to take the books to the computer to be scanned. Portable readers are especially useful during inventory.

Barcode Label Troubleshooting

If you're having issues getting your barcode labels to print properly from Alexandria, here are some basic troubleshooting measures:

- Please update to the most current version of your printer's drivers to avoid (or eliminate) most printing problems.
- Also, take advantage of your printer's latest features to ensure maximum print compatibility and quality.
- If your barcodes *still* appear misaligned, then it's likely that your Adobe Reader PDF page scaling percentage isn't set to `100%`; turn off any "scale to fit" settings if they're enabled (e.g. **Fit to Printable Area** or **Shrink to Printable Area**). Essentially, all printers have an unprintable area (called margins) on the page; misalignment issues can occur when the default **Print** dialog attempts to scale the PDF in order to conform to your page margins. Selecting an "actual size" setting ignores any arbitrary page margins and forces your PDF to print correctly.



- Lastly, check your printer's RAM, *especially* if you are printing hundreds of barcode-intensive labels. Insufficient printer RAM is responsible for many of our reported printing issues, including incorrect alignment issues—even when the **Vertically Center Label** report boxes are checked.
- If you're still having issues, please contact our Technical Support Department at `support@companioncorp.com` or by phone at *(800) 347-4942*.

Setting Up Hosted Service

This section will guide you through Alexandria's hosted setup process.

- NOTE -
COMPanion assumes that you have a basic working knowledge of your computer's operating system.

Make sure to have the registration letter that came with your software—it contains the required username, password, and serial number required during setup.

If you are not familiar with browsers, domain names, IP addresses or other information mentioned above, see your system administrator or other qualified individuals in your organization to help you get set up. If you have questions or problems during installation, contact COMPanion's 24-hour Technical Support Service at *(800) 347-4942* or *(801) 943-7277* or by email via: *support@companioncorp.com*.

Hardware and Operating System Recommendations

System Requirements for Alexandria's Librarian Workstation:

	Recommended	Minimum
Alexandria®: Librarian Workstation	Mac OS 10.8 or 10.9+ Windows 7 or 8 X64 Multi-Core/Processor 2 GB of RAM (or higher)	Mac OS 10.6 Windows XP X86 or X64 Processor 1 GB of RAM 200 MB of Free HD 1024 x 768 Screen Resolution TCP/IP Network
Alexandria®: Web Services ***(and online modules)***	We support the two most recent versions of the following browsers: Chrome Safari Firefox Internet Explorer 1024 x 768 Resolution (or higher) **For iPhone or iPad: iOS 4.0 (or higher)*	Other browsers *may* work; however, we can't guarantee an optimal user experience. **IE8 is only supported for the existing Researcher*

Technology Services Cheat Sheet

In order to use all of Alexandria's services and built-in functionality, you will need your firewall to allow access to certain ports and addresses. However, depending on your internet security requirements, you may only want to enable firewall access for the services that you use.

Below is a list of ports and addresses you should allow in your firewall's access control list.

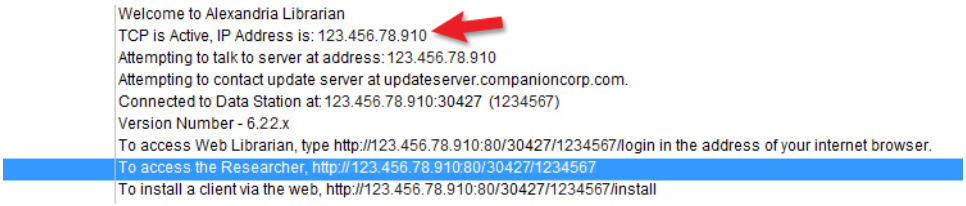
Name	Ports	IP Address	URL/Web Address
Alexandria Data Station/Workstation(s) Web Services (and online modules)	30427 80		
Textbook Tracker Data Station Client Workstation	30467		
COMPanion Database Services: Update Server and Core Services Cover Art Services Google Analytics	80	68.89.29.89	*s3.amazon.com* *aws.amazon.com* *images.amazon.com* *google-analytics.com*
COMPanion FTP Support	21	209.210.70.4	*ftp.companioncorp.com*
MARC Search	210 2200 7090		
COMPanion Online Help	80	209.210.70.4	*www.companioncorp.com/mediawiki/*
COMPanion Support Email	25		*mail.companioncorp.com*
Lexiles	30427	209.210.70.70	
Mitinet's AccessMARC	210		*z3950.accessmarc-db.com*
Axis 360			*axis360.baker-taylor.com*
Baker and Taylor			*schoolselection.btol.com*
Bound to Stay Bound			*www.btsb.com*
Capstone Publishers			*www.capstoneinteractivelibrary.com*
Mackin MackinVIA	 443		*www.mackin.com* *api.mackinvia.com*
netTrekker			*school.nettrekker.com*
NoveList	80		*imageserver.epnet.com*
OverDrive	80 443 80		*api.overdrive.com* *oauth.overdrive.com* *images.contentreserve.com*
Perma-Bound			*www.perma-bound.com/Alexandria*
SAFARI Montage			*safarimontage.com*
Sneak Peek		208.111.148.6	*www.syndetics.com*
Soundzabound			*soundzabound.com*
TABvue			*tabvue.com*

Alexandria Hosted Service Communication Systems

Alexandria Librarians require TCP/IP to communicate with the hosted Data Stations.

- WARNING -
A fixed TCP/IP address for each hosted Alexandria Data Station will be provided to you and cannot be changed or dynamically allocated.

When you license Alexandria's hosted services, you'll be provided with a completely comprehensive *"alexhost.companioncorp.com"* URL. You won't need to worry about setting up the server IP address during the installation process because, if the steps are followed correctly, the client will connect to the hosted Data Station and acquire the appropriate IP/DNS. However, you *will* need this IP/DNS to access your Researcher. Your hosted IP/DNS will appear in your **Transaction Log** each time the Alexandria Librarian Workstation is launched. It is located approximately three or four lines down and will display **TCP Is Active, IP address is:** [your IP address here].


Welcome to Alexandria Librarian
TCP is Active, IP Address is: 123.456.78.910
Attempting to talk to server at address: 123.456.78.910
Attempting to contact update server at updateserver.companioncorp.com.
Connected to Data Station at: 123.456.78.910:30427 (1234567)
Version Number - 6.22.x
To access Web Librarian, type http://123.456.78.910:80/30427/1234567/login in the address of your internet browser.
To access the Researcher, http://123.456.78.910:80/30427/1234567
To install a client via the web, http://123.456.78.910:80/30427/1234567/install

You can also find it by clicking on the **Special** tab followed by the **System Info** subtab and scrolling down the left-hand side to the **Network** section. If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact COMPanion's Technical Support team.

- NOTE -
Make sure that **Port 80** and **Port 30427** are open on your firewall; these ports are used for web access and client-server communications (i.e. communications between the hosted Data Station and Librarian Workstations). In fact, a special list of *ports* and *addresses* required for access has been compiled on page 23. If you don't have the proper authorization or are not familiar with ports and firewalls, please contact your system administrator or other qualified individuals in your organization to help you get set up. If you have questions or problems during installation, contact COMPanion's 24-hour Technical Support Service.

Step-by-Step: Setting Up Alexandria's Hosted Service

Make sure that the machine on which you will be downloading and running the Alexandria Workstation meets the minimum recommendations for both hardware and operating system software *(page 19)*.

All of your library information (data) will be stored at one of COMPanion's secure data network facilities.

After licensing use of Alexandria's hosted service, you can download Alexandria's Librarian Workstation client(s) on other computers over the world wide web (as your license allows).

To download clients over the world wide web, make sure you have the **Login Username** and **Password** provided to you in your registration letter; these will later be available to edit or change in the **Patrons Management** window of your hosted Data Station.

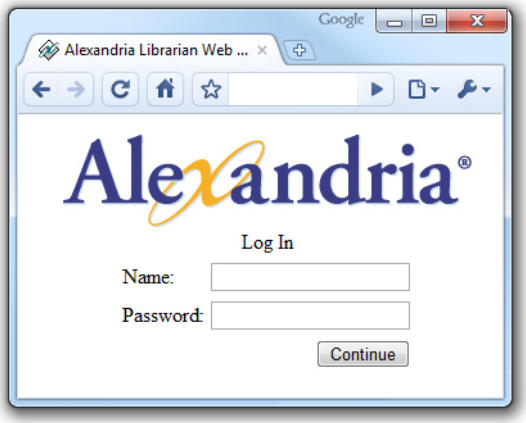
Detailed below are the general steps required to setup Alexandria's hosted service:

Step 1. Since COMPanion hosts your main Alexandria Data Station, it will already be up and running and ready for you to download your Librarian Workstation clients.

Step 2. Determine which computer the Librarian will be installed on. On that machine, open an internet web browser (e.g. Apple's Safari, Mozilla's Firefox, Google's Chrome, or Microsoft's Internet Explorer).

Step 3. In the browser **Address** field (located in the upper-left corner of the window), type the address provided to you in the Alexandria hosted registration letter followed by the serial number and *"/install"* (e.g. this address will look something like this: *alexhost#.companioncorp.com/#######/install*

Step 4. If you performed the latter step correctly, the **Alexandria Hosted Client Download** page should appear, requiring that you input the **Login Username** and **Password** provided to you in your registration letter. Please note that login usernames and passwords *are* case-sensitive; that is, they require the proper invocation of uppercase and lowercase letters.



Step 5. From the provided links, select the appropriate client to download:
- **Windows [Librarian] Workstation**
- **OSX [Librarian] Workstation**

Step 6. After selecting the appropriate client to download, you will be prompted to save the file; choose to **Save File** and click **OK**.

Step 7. The zipped **Alexandria** client file—containing the appropriate client installer—will be downloaded to your operating system's designated "downloads" folder.

Step 8. The downloaded file will be compressed (zipped); extract all of the contents of the file before proceeding. Usually, the extracted folder will appear in the same directory where the *.zip* file was downloaded; in this case, you will have a file and a folder in the directory with the same name—either **Alexandria Librarian (Mac/Win)**, respectively—the only difference being that one is zipped.

Step 9. If you haven't already moved the extracted client folder to your desktop, we recommend that you do so now. The client folder can be moved *anywhere* on your machine—it's generally just moved to the desktop to make it easier to find.

Step 10. Inside your newly extracted folder, double-click on the **Alexandria Librarian** installer icon (*.exe* or *.app*) to launch the application.

Step 11. The Librarian application will launch and automatically connect to the hosted Data Station.

Although it's nearly foolproof, if any part of the installation process goes awry, please contact COMPanion's Technical Support Service at (800) 347-4942 or (801) 943-7277 and follow their guided, step-by-step instructions.

Notes:

Alexandria Basics

This chapter describes the main system menus and basic operational rules used in Alexandria.

Alexandria menus follow operating system standards for Macintosh and Windows. For example, the **File** and **Edit** menus in Alexandria are very similar to the **File** and **Edit** menus in other applications. Additional menus have purposes specifically related to library management.

Alexandria has been developed to work under both Windows and Macintosh-based operating systems. With the exception of subtle deviations between the controls at the tops of windows and minor differences in operating system functionality, the program looks and operates identically across both Macintosh and Windows platforms.

However, these operating systems *are* different, therefore, there are some variations between environments. For example, on the Macintosh you press the <Cmnd> key for menu shortcuts and in Windows you select the <Ctrl> key. Windows and Macintosh have different controls for minimizing, closing, and resizing windows. In order to keep our documentation as clear as possible, this guide will generally discuss actions rather than operating system-specific commands or controls.

Rather than "click the red close box at the upper-right of your window," this guide will read "close the window," and allow the operator to select the operating system-specific commands required to control Alexandria.

This guide contains images from both Windows and Macintosh versions of Alexandria.

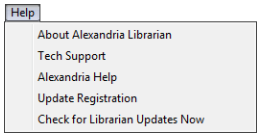
Macintosh & Windows Command Differences

Macintosh Command Key	Windows Command Key	Usage
<Cmnd>	<Ctrl>	Perform menu shortcuts.
<Option-Tab>	<Ctrl-Tab>	Perform Authority Control.
<Option>	<Ctrl>	Display Tool Tip.
<Option>	<Alt>	Used to modify commands.

The following sections describe some basic operational elements found in Alexandria.

Alexandria Online Help

Almost every window in Alexandria has a special, round **Online Help** button; clicking this button opens your default web browser to the related Online Help page. These pages contain information directly related to the area of Alexandria you are using and explain, in detail, how to use them.



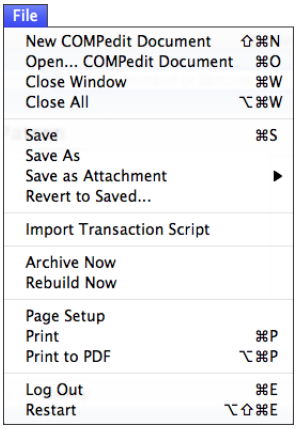
Help Menu

On Macintosh, there is an **Alexandria** system drop-down menu that contains the **About Alexandria** and **Tech Support** selections. There is also a **Help** menu that contains the **Alexandria Help**, **Update Registration**, and, if you're on an installed Librarian client, **Check for Librarian Updates Now** selections.

On Windows, all these selections are located under the **Help** menu.

- **About Alexandria—**Shows copyright and version information.
- **Tech Support—**This opens the **Email** subtab under the **Support** tab of the main **Circulation** window, allowing you to send email to COMPanion if you are connected to the internet—even if you don't have your own SMTP (simple mail transfer protocol) address configured *(see "SMTP tab" on page 152)*.
- **Alexandria Help—**This button opens your default web browser to the main index page of Alexandria's Online Help.
- **Update Registration—**The ability to update your registration information is not available to hosted users—if necessary, COMPanion will do that for you.
- **Check for Librarian Updates Now—**Data Stations that are hosted by COMPanion are routinely evaluated and updated to the latest versions; this requires connected Librarian Workstations to be updated in tandem. While users have no decision power over this process, they can choose to update certain associated third-party applications and certain **Explorer** resources.

File Menu



The Alexandria **File** menu provides the following selections:

- **New COMPedit Document** (Cmnd/Ctrl+Shift+N)—Opens a new COMPedit document; COMPedit is Alexandria's integrated word processor.
- **Open... COMPedit Document** (Cmnd/Ctrl+O)—Opens your standard operating system explorer window used to locate files. When you select a document from this window, Alexandria will open it (if it is able). Use this command to open COMPedit documents, *.txt* documents, MARC documents, MicroLIF documents and other files for viewing.
- **Close Window** (Cmnd/Ctrl+W)—Closes the topmost Alexandria window exception for the **Circulation** window (which can't be closed while Alexandria is running).
- **Close All** (Cmnd/Ctrl+Alt+W)—Closes *all* Alexandria windows except for **Circulation**.

- **Save** (Cmnd/Ctrl+S)—Saves the contents of the topmost Alexandria window.
- **Save As**—Allows you to save *.vwp* documents to specific locations on your hard drive.
- **Save as Attachment**—This allows you to attach the content of any COMPedit *.vwp* document to a **Tech Support Message** using the **Email** subtab under the **Support** tab of the main **Circulation** window. You may also attach an **Item** or **Patron** record as an attachment when you send an email to our Technical Support service department.
- **Revert to Saved...**—Changes made to the current record are discarded and the original content is restored in the window. This doesn't affect Alexandria's web services or online interfaces.

- **Import Transaction Script**—If you use a portable laser scanner for specific library duties (e.g. inventory) and have downloaded the data to your hard drive, use this command to import and process the script on your hosted Alexandria server.

- **Archive Now**—Performs an immediate backup of your hosted Alexandria data. For more information on archiving, please review page 59.
- **Rebuild Now**—Performs an immediate **Rebuild** of your hosted Alexandria data. Before rebuilding, Alexandria will ask if you would like to perform an archive first *(strongly recommended)* and then ask if you would like to restart Alexandria after a successful rebuild. You will be unable to perform any duties on Librarian Workstation(s) while your hosted database is rebuilding.

- **Page Setup**—Operating system standard function that prepares the page for printing.
- **Print** (Cmnd/Ctrl+P)—Prints the information contained in the window that has focus (i.e. the topmost window in the forefront). For example, if the **Patron Management** window has focus, information for the selected patron is printed when this command is selected. If the **Circulation** window has focus, then the transaction log is printed.
- **Print to PDF** (Cmnd+Option+P)—This allows you to save any finished reports or COMPedit world processor documents as an Adobe *.pdf* file (Macintosh only).

- **Log Out** (Cmnd/Ctrl+E)—This command closes the **Circulation** window and disallows anyone without proper authorization to access Alexandria. Instead, an **Alexandria Log In** window appears, awaiting a correct **Username** and **Password**. If a high-level user steps away from the Librarian Workstation and doesn't want close the client, the **Log Out** function provides this security *(see "First Time Log In, Authentication, and Operator Creation" on page 34 for more information)*.
- **Restart** (Cmnd/Ctrl+Alt+Shift+E)—Logs out the current operator, closes all windows, restarts the Librarian Workstation client, and brings up the **Alexandria Log In** window.

- **Quit/Exit Librarian** (Cmnd/Ctrl+Q)—Quits the Librarian Workstation (Windows only; in OSX this is located under the Alexandria drop-down menu).

Edit Menu

This menu contains standard editing functions. You can cut, copy and paste text, clear a field, select all text, and paste from a file. Information about commands which are specific to Alexandria are detailed below.

- **Undo** (Cmnd/Ctrl+Z)—This command only undoes typing or cut-and-paste operations in individual fields or in the COMPedit word processor. It does *not* undo operations from other menus, utilities, commands, or controls.
- **Redo** (Cmnd/Ctrl+Shift+Z)—An undo for the undo.

- **Cut, Copy and Paste**—You can cut, copy, and paste text from certain fields to other fields within Alexandria. For example, you can cut text from the **Title** field and place it in the **Notes** field. You can *not* cut and paste entire library records. If you need to transfer entire records into another application, use the **Export** function to save the records you need in a format compatible with that program.
- **Clear**—Clears the selected text or selected list elements.
- **Select All** (Cmnd/Ctrl+A)—Selects all the text in the current edit field, current COMPedit (*".vwp"*) document, or list.

- **Spelling**—Alexandria, like many other programs that run on Macintosh OS X, provides a handy spell-checking feature; you can check spelling in documents such as **TextEdit** files or email messages (Macintosh only).

- **Find** (Cmnd/Ctrl+F)—This selection opens the **Find** window. Depending on which window has focus, **Find** can be used to locate a specific record from your database or text in a COMPedit (*".vwp"*) word processing file.
- **Find Again** (Cmnd/Ctrl+G)—Finds the next matching record or text in a COMPedit (*".vwp"*) word processing file (Macintosh only).

- **Paste From File**—Allows you to paste information from a file.

- **Administration** (Opt+Cmnd+; / Ctrl+Alt+;)—This selection opens the **Administration** ("`/admin`") settings web interface *(see "Administration Settings" on page 57)*.
- **Preferences** (Cmnd/Ctrl+;)—This selection opens the **Preferences** ("`/preferences`") web interface, which is used to customize Alexandria to suit your needs by setting "local" and site-specific preferences *(see "Introduction to Preferences" on page 51)*.
- **Machine Preferences**—This selection opens the **Machine Preferences** window, where you can apply hardware settings to just one computer.

Show Menu

Use this menu to move between various Alexandria services and modules such as **Patron/Item Management** and **Circulation**. For example, if you need to manage patron information, select **Patrons** from the **Show** menu. To check items out or perform other transactions, select **Circulation**.

Most of the selections in the **Show** menu have a corresponding section in this guide; refer to each specific section for detailed information about how each functions.

- **Bulletin Board**—This opens the **Bulletin Board Management** ("`/managebulletins`") web interface, used to create electronic library bulletins. You can "post" items on the public **Bulletin Board**, which all patrons can view via the Researcher *(for more information, please review the "Bulletin Board" section of Alexandria's Online Help)*.

- **Circulation** (Cmnd/Ctrl+T)—Shows the **Circulation** window. Select this option if you want to check out, check in, place holds, charge fines, place reservations, accept payments, or perform inventory and other circulation functions. The **Circulation** window is *always* open while Alexandria is running; use this menu selection to bring it to the forefront.
- **Items** (Cmnd/Ctrl+I)—Opens/shows the **Item Management** window; use this window to examine, add, modify, or remove title or copy records from your library.
- **Patrons** (Cmnd/Ctrl+L)—Opens/shows the **Patron Management** window; use this window to examine, add, modify, or remove patron or operator records.

- **Researcher** (Cmnd/Ctrl+K)—This opens the Alexandria Researcher "pick list" in your default web browser; from there you can select the search interface you would like to use to browse your online public access catalog (e.g. **Scout**, **Researcher**, **Mobile**). If you're in a Central Union, this selection triggers the **Select A Site** list first. For more information on Researcher interfaces, see page 235.

- **Orders**—Opens/shows the **Orders** management window; use this window to examine, add, modify, or remove order records.
- **Budgets**—Opens/shows the **Budgets** management window; use this window to examine, add, modify, or remove budget records.
- **Vendors**—Opens/shows the **Vendors** management window; use this window to examine, add, modify, or remove vendors.
- **Subscriptions**—Opens/shows the **Subscriptions** management window. Select this command to examine, add, modify, or remove subscription records.
- **Routes**—Opens/shows the **Routes** management window. Select this command to examine, add, modify, or remove route records.

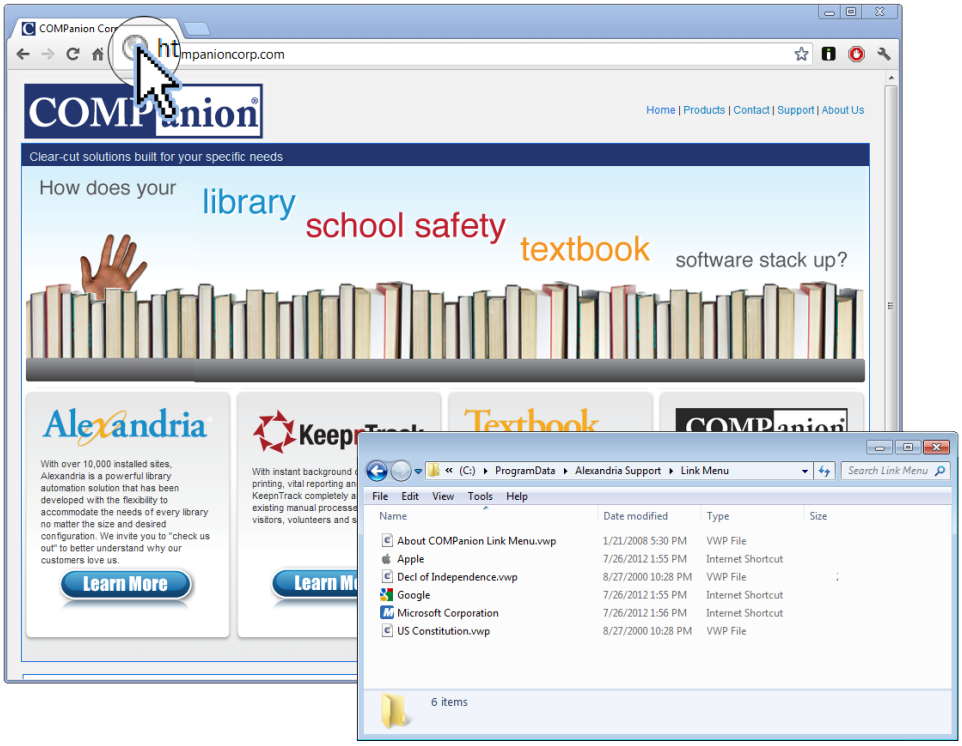
Tools Menu

- **Export**—Opens the **Export** utility, allowing you to export items, patrons, or other miscellaneous data from the hosted Alexandria database.
- **Import**—Opens the **Data Import** window *(page 159)* used to locate files or schedule imports from an FTP server. Import files can also be "dropped" onto the **Circulation** window.
- **Reports**—Opens the **Reports** window, allowing you to create, find, duplicate, schedule, remove, or browse report categories (and subcategories) such as **Titles**, **Patrons**, or **Circulation** *(see "An Introduction to Reports" on page 198)*.
- **Utilities**—Opens the **Utilities** window, allowing you to make global changes to batches of information in your hosted Alexandria database *(see "Getting Started With Utilities" on page 209)*.
- **Operation Management**—Opens the **Operation Management** window, where reports delivered to the hosted Data Station are available for viewing from any connected client workstation. Reports queued in the system are also available for operators so they can prioritize or remove them, etcetera *(see "Operation Management" on page 217)*.

- **Inventory Management**—Opens the **Inventory Management** ("`/inventory`") web interface, allowing you to inventory, modify, and print reports for all the items in your collection *(for more information, please review the "Inventory Helper" section of Alexandria's Online Help)*.
- **SIF Management**—Opens the **SIF Management** web interface ("`/sif`") allowing you to set up and manage your **Schools Interoperability Framework** (SIF), an industry-supported technical protocol that ensures that diverse primary and secondary (K-12) instructional and administrative software applications share information (data formats) and work together seamlessly *(for more information, please review the "SIF Management" section of Alexandria's Online Help)*.
- **Site Management**—Opens the **Site Management** web interface ("`/sites`"), allowing you to manage **Site ID Codes** and provide information pertaining to your school or each of the individual schools in your **Central Union**.
- **Authority Control**—Opens the **Authority Control** window. Select this command if you would like to find, add, duplicate, remove, or view the authority-controlled fields in your database.
- **Map Management**—Opens the **Map Management** web interface ("`/maps`") and allows you to associate notes, pictures, or maps of your library with item call numbers; a **Show Map** link is available in your Researcher and Scout **Search Details**.
- **Explore Builder**—Opens the **Explore Builder** window, allowing you to create a fun and attractive iconic interface which patrons can use to search library collections.
- **Review Management**—Opens the **Reviews** management web interface ("`/reviews`") where patron reviews are approved—or rejected—before being displayed in your **Researcher Results**.

Links Menu

The **Links** menu provides an easy way for you to quickly jump to other programs and *world wide web* resources that may be required for your work.


COMPanion
Home | Products | Contact | Support | About Us
Clear-cut solutions built for your specific needs
How does your
library
school safety
textbook
software stack up?
Alexandria
With over 10,000 installed sites, Alexandria is a powerful library automation solution that has been developed with the flexibility to accommodate the needs of every library no matter the size and desired configuration. We invite you to "check us out" to better understand why our customers love us.
Learn More
Textbook
ProgramData ▸ Alexandria Support ▸ Link Menu
Search Link Menu
File Edit View Tools Help
Name
Date modified
Type
Size
About COMPanion Link Menu.vwp 1/21/2008 5:30 PM VWP File
Apple 7/26/2012 1:55 PM Internet Shortcut
Decl of Independence.vwp 8/27/2000 10:28 PM VWP File
Google 7/26/2012 1:55 PM Internet Shortcut
Microsoft Corporation 7/26/2012 1:56 PM Internet Shortcut
US Constitution.vwp 8/27/2000 10:28 PM VWP File
6 items

The **Link Menu** folder is automatically created in your **Alexandria Librarian Support** folder. Any document, program, URL, shortcut, or alias you place in this folder gets displayed in the **Links** menu. When you make a selection from this menu, that linked document, program, URL, shortcut, or alias is launched.

The contents of the main **Link Menu** folder on the hosted Data Station are automatically copied to the **Link Menu** folder of each Librarian Workstation the very first time *that* client Workstation is launched. After the **Link Menu** folder has been initially created, any changes made to a particular Workstation's **Link Menu** folder are for *that* Workstation *only*.

If the **Link Menu** folder is deleted, the Workstation will create a new one the next time the Librarian is launched and the default documents, programs, URLs, shortcuts, or aliases will again be automatically copied from the hosted Data Station.

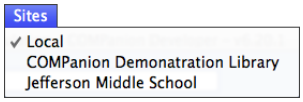
URL links (pictured above) are generally the little "favicons" found just before the http address in the address bar field of your default internet browser. Drag and drop any program shortcut (alias) or URL into the **Link Menu** folder to make them appear in the **Links** menu.

If you are licensed to use Alexandria's **netTrekker** and **SearchALL** functionality, hyperlinks to their respective websites will automatically appear in the **Links** menu.

- HOST-IT- NOTE-

Since the **Link Menu** folder of the hosted Data Station is unavailable to operators, please contact COMPanion's Technical Support Service at *(800) 347-4942* (or by email) and provide them with the documents, URLs, video/audio files, executables, or images you would like to have broadcast to all your client Workstations.

Sites Menu (District Librarian only)



The **Sites** menu allows you to select which hosted Data Station you would like to connect to. When a District Librarian connects to a hosted Data Station, it performs *exactly* like a Librarian Workstation installed for that Data Station *(for more information, please review the "District Librarian" or "Central Union" section of Alexandria's Online Help)*.

Window Menu

As you open new windows in Alexandria, the **Window** menu will contain a list of all currently active windows. The example **Window** menu in the margin shows that the **Circulation** window is open and active and the **Patron** and **Item Management** windows are also open.

To choose a window, select it from this menu. The window you select gets focus and becomes the active window.

If you select **Bring all windows into view**, all minimized windows will appear, with focus placed on the **Circulation** window.

When you close a window, it is removed from this menu.

- NOTE -
The **Window** menu does *not* include web services and/or interfaces.

NOTE:
Users of current and future versions of Alexandria will find they are no longer able to run without security.

First Time Log In, Authentication, and Operator Creation

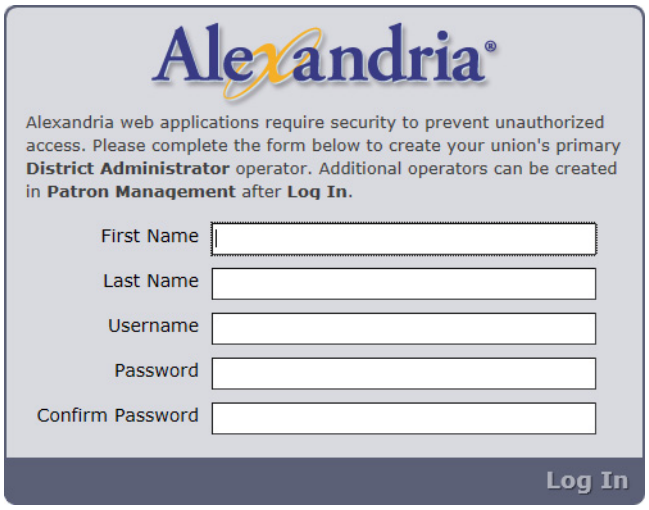
In Alexandria v6.22 (and higher), security is *mandatory* and *permanently* enabled. With more and more Alexandria modules moving online, these web-based modules and interfaces make security an absolute requirement in order to prevent unauthorized access.

Therefore, it is *required* that your very first practical operator be a **District Administrator** with the equivalent **Security Group** access. A valid Alexandria registration is the only authentication needed to create your initial **District Administrator** operator.

The **District Administrator** security group is only meaningful for multi-library collection licenses (Central Union, WAN, etc.); for all other licenses, the **District Administrator** security group is analogous to the **Library Administrator**.

If you haven't yet created a **District Administrator** operator, the first time that you access the program you will be logged in as your union's **System Administrator** (barcode 10); this is a special operator.

If the **System Administrator** (barcode 10) has your union site's **Serial Number** as its password and you attempt to access one of Alexandria's online components[1], you will be forced to create a new **District Administrator**-level operator; this operator may be edited later.


Alexandria
Alexandria web applications require security to prevent unauthorized access. Please complete the form below to create your union's primary District Administrator operator. Additional operators can be created in Patron Management after Log In.
First Name
Last Name
Username
Password
Confirm Password
Log In

When the **New Operator** window is presented to the user in place of the standard **Log In** window, you are asked to provide your union's new **District Administrator** operator information: **First Name**, **Last Name**, **Username**, and **Password** (including a standard password confirmation).

Upon completion, the **System Administrator** (barcode 10) password will be changed from the **Serial Number** to a random, cryptographic string. At this point, it's not expected that the **System Administrator** (barcode 10) should ever be used for logging into Alexandria again.

This new **District Administrator**-level operator will be created using the information provided above and then, using these credentials, will be automatically logged into the originally intended destination module.

1.Web-based module or interface component.

Logging In and Activating Security

Alexandria is a program with a foot in both offline and online worlds; therefore, security is considered mandatory and will always be enabled. Access to our software requires that the **Username** and **Password**[1] of a valid operator with the appropriate **Security Group** credentials be entered into the **Log In** window every time the program is launched.

If you would like to immediately access the **Log In** window (or log into our software as a different operator), choose **Restart** (Ctrl+Alt+Shift+E) (Opt+Cmnd+E) or **Log Out** (Ctrl/Cmnd+E) from the **File** menu.

When the **Alexandria Log In** window appears, enter the appropriate **Username** and **Password** and click **Log In** to access the software.

The **Username** and **Password**[2] that you enter during **Log In** will be recorded to the **Transaction/Server Log** as well as all failed login attempts.

1. If a **Username** or **Password** was *not* supplied in the **Personal Info** tab during the creation of a new patron/operator, their **Barcode** will be used as the **Username** and their **Last Name** will be used as the **Password** by default.
2. Password does *not* appear in the **Transaction Log** of the main **Circulation** window; however, it *does* appear in the **Server Log**.

Accessing Alexandria as a Different Operator

There are times when you will need to access Alexandria as a operator other than the one who is currently logged into the program; especially if you are required to perform a specific task that the current operator does not have the security permissions to accomplish.

NOTE:
Username and **Passwords** are *not* case sensitive!

For example, on a Librarian Workstation that is currently being used by a **Student Aide**, you may need to log in as the **District/Library Administrator** to change a preference—a task for which the default **Student Aide** does *not* have authorization.

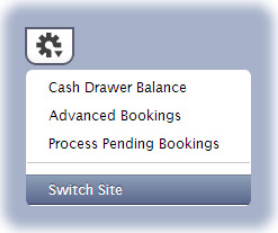
Here's how you can access Alexandria as a different operator:

- **Restart** (Ctrl+Alt+Shift+E) (Option+Cmnd+E) or **Log Out** (Cmnd/Ctrl+E)[1] from the **File** menu. When the **Alexandria Log In** window appears, enter the appropriate **Username** and optional **Password** and click **Log In** to access the software as an entirely new operator. This way, if the operator who is currently logged into the program doesn't have the security permissions to access or change specific options, information, or preference tabs, you may **Log In** as an operator that does.

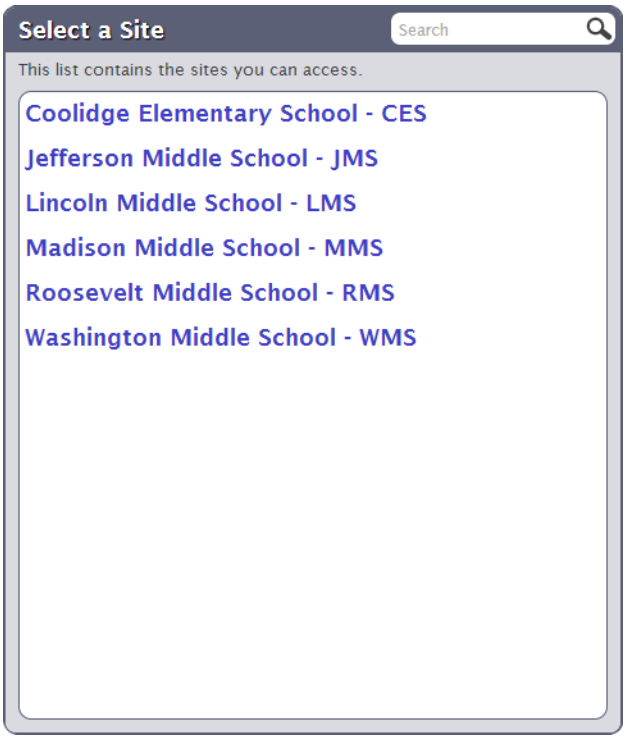
Accessing a Different Alexandria Site

In many of Alexandria's web services and online interfaces, we allow operators with the proper **Security Group** permissions *(page page 65)* to change sites without having to **Log Out** and back in again. This is done via a system-standard roll-down window that contains a list of *all* the sites for which the operator has access.

The last site selected will be highlighted in the list; the **Select a Site** roll-down does *not* appear when an operator only has access to *one* site.



This is the **Switch Site** selection in the primary **Actions** menu of the **Circulation** window *(page 228)*.


Select a Site
Search
This list contains the sites you can access.
Coolidge Elementary School - CES
Jefferson Middle School - JMS
Lincoln Middle School - LMS
Madison Middle School - MMS
Roosevelt Middle School - RMS
Washington Middle School - WMS

1.Some security groups require the proper security permissions to perform a **Restart**.

Web Services and Online Modules

NOTE:
Be sure to bookmark the web addresses of your favorite online modules for future access.

You can access many different parts of Alexandria through your default web browser. To do this, enter the IP address (or server domain name) and port number of your hosted Data Station followed by a forward slash ("/") and the name of the online module you want to access into the address bar of your web browser (e.g. `http://123.456.78.910:80/preferences`). This allows you to access parts of your Alexandria database without installing a Librarian Workstation.

If you are not sure what IP address (or server domain name) your hosted Data Station uses:

- On an installed Librarian Workstation, the web address of your hosted Data Station can be seen at the top of the **Circulation** window.
- The hosted Data Station IP address can also be found in the **Circulation** window by scrolling to the top of the **Transaction Log**; you can also find it by clicking on the **Special** tab followed by the **System Info** subtab and scrolling down the left-hand side to the **Network** section.
- On Researcher or Scout, the web address and port number of the hosted Data Station will be seen in the address bar of your web browser followed by "`/researcher`" or "`/scout`".

As more Alexandria modules move onto the web, you'll be able to do more remotely via your web browser. After all, if you can access the Researcher, you can access *any* of our online modules as well.

Here's just a few extensions that you can append to your IP address to access their associated modules through the web browser:

`/admin`	`/preferences`
`/circulation`	`/reports`
`/exports`	`/researcher`
`/imports`	`/reviews`
`/inventory`	`/scout`
`/items`	`/selfservice`
`/librarian`	`/selfservicein`
`/login`	`/selfserviceinout`
`/messages`	`/sif`
`/mobile`	`/sites`
`/operations`	`/tools`
`/patrons`	`/utilities`

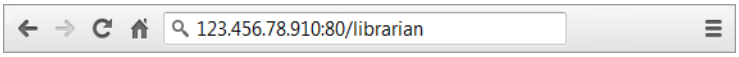
As always, if you have any questions, please don't hesitate to contact us by calling *(800) 347-4942* or through email at *support@companioncorp.com*.

Accessing Alexandria's Web Librarian

You have the convenience of configuring preferences and running certain Librarian Workstation reports and utilities over the *world wide web*. However, operators attempting to access these online features must have the proper **Administrator**-level type **Security Group** permissions *(page 65)*.

Step 1. To access the Web Librarian, launch your default web browser (e.g. Apple's Safari, Mozilla's Firefox, Google's Chrome, or Microsoft's Internet Explorer).

Step 2. In the browser window's address field (typically located in the top-left corner of the window), enter the IP address (or domain name) of your hosted Data Station.



Step 3. This address is displayed in Alexandria's **Transaction Log** when you first launch the Librarian Workstation. However, if you are having trouble locating the IP/DNS your hosted Data Station uses, please contact COMPanion's Technical Support Service at (800) 347-4942 or (801) 943-7277 and follow their guided, step-by-step instructions.

Step 4. If specified, don't forget to include the port number at the end of your *www* address. For example, if the location of your hosted Data Station is "`www.alexweb.com`" and the port value is "80", type "`www.alexweb.com:80/`" in the **Address** field (without the quotation marks).

- NOTE -

If you are not familiar with browsers, domain names, IP addresses or other information mentioned above, see your system administrator or other qualified individuals in your organization to help you get set up.

Adaptive Dates

An adaptive date can be substituted for an actual date *anywhere* within Alexandria; however, adaptive dates are mostly used with exports, utilities, and reports.

Here are the terms you can substitute for an actual date in the Alexandria **Date Range** selection fields:

%today or **%td —** Entering these commands into a date field is the same as entering today's date. For example, if today's date is February 27, 2014, then entering `%td` or `%today` is the same as entering `2/27/14`.

%yesterday or **%yd —** Entering these commands into a date field is the same as entering yesterday's date. For example, if yesterday's date was April 6th, 2012, then entering `%yd` or `%yesterday` is the same as entering `4/6/2012`.

%tomorrow or **%tm —** Entering these commands into a date field is the same as entering tomorrow's date. For example, if tomorrow's date is April 8th, 2012, then entering `%tm` or `%tomorrow` is the same as entering `4/8/2012`.

%lastweek or **%lw —** Entering the `%lw` or `%lastweek` command will subtract seven days from today's date. For example, if the current date is April 7th, 2012, then entering `%lw` or `%lastweek` is the same as entering `3/31/2012` (March 31st, 2012).

%nextweek or **%nw —** Entering the `%nw` or `%nextweek` command will add seven days from today's date. For example, if the current date is April 7th, 2012, then entering `%nw` or `%nextweek` is the same as entering `4/14/2012` (April 14th, 2012).

%lastmonth or **%lm —** Entering the `%lm` or `%lastmonth` command will subtract thirty days from today's date. For example, if the current date is April 7th, 2012, then entering `%lm` or `%lastmonth` is the same as entering `3/8/2012` (March 8th, 2012).

%nextmonth or **%nm —** Entering the `%nm` or `%nextmonth` command will add thirty days from today's date. For example, if the current date is March 8th, 2012, then entering `%nm` or `%nextmonth` is the same as entering `4/7/2012` (April 7th, 2012).

%lastyear or **%ly —** Entering these commands into a date field is the same as entering today's date, but last year. For example, if today's date is April 7th, 2012, then entering `%td` or `%today` is the same as entering `4/7/2011`.

%nextyear or **%ny —** Entering these commands into a date field is the same as entering today's date, but next year. For example, if today's date is April 7th, 2012, then entering `%td` or `%today` is the same as entering `4/7/2013`.

Also, you are allowed to add or subtract a number of days from each adaptive date selection. For example, `%td - 5` will take today's date and subtract five days. Further, `%tm + 20` will take tomorrow's date and add twenty days.

Notes:

Site Management Window

Alexandria® Hosted Service

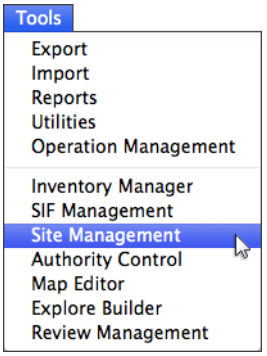
> **- NOTE -**
>
> You are not allowed to duplicate or add additional sites with a single site license. You *must* be registered for multiple sites in order to use Central Union—a special configuration of Alexandria; *see page 3 for more information*. Please contact COMPanion's sales department at *(800) 347-6439* if you would like to upgrade to a Central Union license and increase your site limit.

It is *absolutely essential* that you configure your site information before doing anything else. First, ensure that your union site information is accurate. Next, if you're operating in a Central Union environment, now is the perfect time to add additional sites. In order for a copy or patron to exist in your database, they *must* belong to a site; therefore, accurate **Site** records are a *necessity*.

This chapter describes the basic layout and functionality of the **Site Management** window; you will learn how to quickly add, duplicate, delete, and edit site information.

How to Access the Site Management Window

To manage your sites from an installed Librarian Workstation, select **Site Management** from the **Tools** menu; this will open the **Site Management** window in your default browser.



Otherwise, you can access Alexandria's **Site Management** window anywhere in the world by typing the IP/DNS address of your hosted Data Station (e.g. "`123.456.78.910:80`") followed by "`/sites`" into your browser's **Address** field (usually located in the upper-left corner of the window).

If you are not sure what IP address (or server domain name) your hosted Data Station uses:

- It appears in the **Transaction Log** of the main **Circulation** window each time your Librarian Workstation is launched; approximately three or four lines down.
- You can also locate your IP address under the **Network** header in the **System Info** subtab of the **Special** tab of the **Circulation** window.
- If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact COMPanion's Technical Support team by calling *(800) 347-4942* or via email at *support@companioncorp.com*.

What is Site Management?

For Single Sites:

If you manage a single site collection, you will only ever have information for your *one* site in the **Site Management** window; you won't have access to the **Site Record List** and associated tools *(page 46)*. In fact, if you're a single site, you can skip ahead to verify your site information in the **Current Site Record** pane; see page 48.

However, Alexandria also has the ability to mange *multiple* collections stored within a single database; we call this a Central Union (*see page 3)*. If you are part of a Central Union, information for *all* the individual sites in your district will be stored and maintained in the **Site Management** window.

For Central Union:

In a Central Union catalog, you manage *multiple* collections and must be able to quickly differentiate one catalog from another. Therefore, Alexandria appends the **Site Management** window with an additional **Site Records List** which allows you to move between and configure individual site information, including unique **Site Codes**[1] for patron and item records.

Alexandria retains the aforementioned union site record in a Central Union environment to assist you in setting up and configuring additional sites after initial installation. However, you shouldn't think of the union site record as an actual, physical location—instead, think of it as the "parent" to which all your local site collections (i.e. "children") belong. Although some of your union site record information is established during registration, you may want to later amend this information to better represent your district entity.

As you create new sites in the **Site Management** window, be sure to provide each one with a unique **Site Code**; these can then be assigned to patron and item records. However, you should *never* willingly assign patrons or items the union **Site Code**. Additionally, as new sites are created in the **Site Management** window, **Site Names** are automatically added to the **Select a Site** access window and the "local collection" contained in the Researcher's **Library Search** menu. However, the union site record will not be included among these. In other words, you will be unable to search for items using the union site record.[2]

Another reason that the union site record exists in a Central Union catalog is for when patron and item records are being imported or added to your database with missing or incorrect **Site Codes**. Since these new patron and item records have to go somewhere, they are temporarily assigned to the union site until they can be later moved to an appropriate site location.

You are *not* allowed to add additional sites with a single site license. You *must* be licensed for *multiple* sites in order to use Central Union. Please contact COMPanion's sales department at *(800) 347-6439* if you would like to upgrade to a Central Union license and increase your site limit.

For more information about other areas affected by Central Union and **Site Management**, please review the *"Central Union Areas Affected by Sites Management"* section in our **Online Help**.

---

1. **Site Codes** are unique identifiers that tell Alexandria which site the patron or item records belongs.
2. They will, however, show up if you perform a search on using the **Search All Sites** selection from the **Library Search** menu.

Why Site Codes are Important in a Central Union:

In a Central Union environment, operators and patrons must be able to quickly differentiate data belonging to one collection over another. In order to achieve this, our software embeds patron and item records with something called a **Site Code**.

Site ID Codes are used in several ways:

- To identify the collection for which a copy belongs.
- To identify the site for which a patron belongs.
- To determine whether a book-dropped copy was returned to the correct location or if it needs to be placed *in transit* and returned to the owning library.
- To determine copy availability at particular locations when placing holds and reservations.
- To filter a patron's Researcher search results to display only a particular collection (or group of collections) for which they are interested.

Other areas affected by **Site Management** include **Acquisitions** (**Orders**, **Budgets**, **Vendors**, **Subscriptions**, and **Routes**), **Maps**, and **Bulletins**.

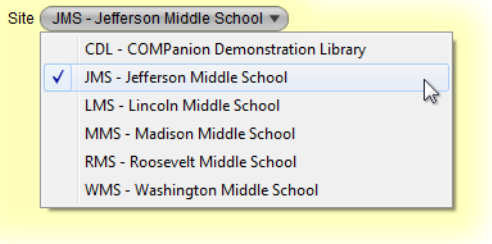
The Site Management Window In More Detail

The **Site Management** window is where you configure or create **Site ID Codes** and provide information pertaining to either your single school or each of the individual schools in your Central Union.

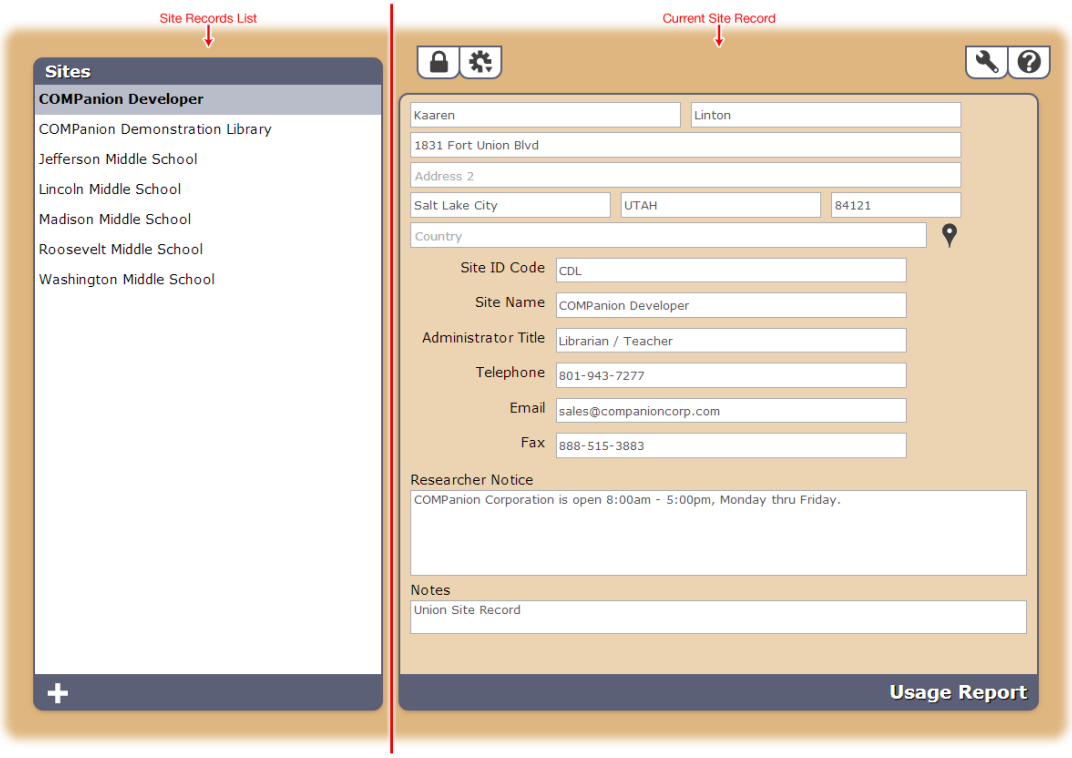
Your initial (or union) site record is initiated by your registration information. You'll have to provide your address, city, state, postal code, country, telephone and fax data; these are required for return addresses on patron notices, for information shown on Researchers, and is included in emails sent to COMPanion's Technical Support team.

The address information you provide will also be used as defaults when creating a new patron if no city, state, postal code, or country information is specified.

Once a new "site" has been created, it can be selected by any operator (depending on their **Security Group** and **Site Access** settings; *see page 273*) using **Site** drop-down menus found in the **Patron** and **Item Management** windows, the **Orders**, **Budgets**, **Vendors**, **Subscriptions**, and **Routes** windows, **Maps**, **Bulletins**, and the Alexandria Researcher. Valid and available sites are *always* pulled from **Site Management** window.


Site
JMS - Jefferson Middle School
CDL - COMPanion Demonstration Library
JMS - Jefferson Middle School
LMS - Lincoln Middle School
MMS - Madison Middle School
RMS - Roosevelt Middle School
WMS - Washington Middle School

Refer to the information contained on page 41 to find out how to access the **Site Management** window (shown below) in your default browser. Once you have access, you will be able to view, modify, add, and remove site information by using the current record fields and commands in the **Actions** menu. By default, only operators with **District** or **Library Administrator** security levels may configure site information; for more about **Security Levels**, see page 65.



The **Site Management** window consists of a similar two-panel layout found in many of Alexandria's main management windows.

- The left-hand side of the **Site Management** window belongs to the **Site Records List**, used for browsing sites and other related tools. If you are a *single site* user, the **Site Records List** isn't available and *does not* appear.
- The larger, right-hand portion of the **Site Management** window consists of the **Current Site Record** pane where the currently selected site record is displayed, in full, along with associated tools (in the **Actions** menu) that help perform operations on said record.
- The site you are presently viewing is called the *current site*. If you are part of a Central Union environment, you will have multiple sites records to choose from. When you click on (i.e. select or highlight) a site from the **Site Records List** pane, that site's record information will be displayed in the **Current Site Record** pane on the right.

Site Records List and Associated Tools

The left-hand section of the **Site Management** window contains the **Site Records List** pane, where all the sites in your union are contained. Highlighting (selecting) an entry from the **Site Records List** will display that site's information in the **Current Site Record** pane on the right.

The **bolded** site at the top of the **Site Records List** is considered your *union* site; if you are a single site license, you will only have this *one* site and are *not* allowed any others. Please contact the COMPanion Sales department at *(800) 347-6439* if you would like to upgrade to a Central Union license and increase your site limit.

If you're a *single site* user, the **Site Records List** isn't available and *does not* appear.

Browsing the Site Records List

If you *are* part of a Central Union, use the **Site Records List** to browse through individual sites, starting with the site that is currently highlighted.

Selecting (highlighting) a specific site from the **Site Records List** will make that site current in the right-hand section of the **Site Management** window.

If you need to select a site preceding or following the one currently highlighted, use the options listed below to move backwards and forwards through the sites:

- Use the <up> or <down> arrow keys to move up and down through the list
- Stop on the site that you want to view, remove, duplicate, or modify.

Associated Tools of the Site Records List

The area located below the record list field contains a tool icon used for adding sites.

- **Add—**Clicking this button allows you to create a new site record; a unique **Site ID Code** and **Site Name** are required to **Save** a new site.

Current Record Pane

The right-hand section of the **Site Management** window is dedicated to the current site record, which displays full details for the site selected from the **Site Records List** pane on the left.

At the top of the current site record pane is a long, rectangular area used for displaying status information; **Save** and **Revert**, the **Online Help** icon, the **Lock/Unlock** icon and an **Actions** icon which contains functions specific/unique to the current record.

Unlock/Lock Icon—Before records can be modified, they must first be unlocked. For example, when the **Site Management** window is opened, the default state of the window is "locked". When locked, records can be viewed but *not* edited. Clicking on the lock icon unlocks the window; it stays unlocked until the operator clicks on the lock icon again or the window is closed.

Actions—This gear/cog menu contains record-specific actions and other tools.

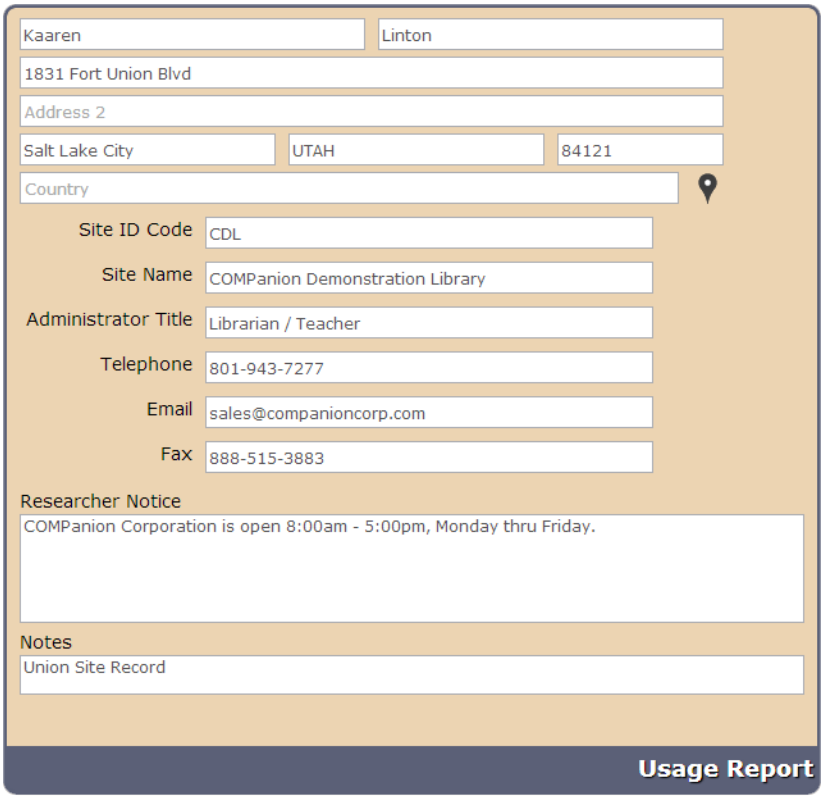
- **Delete Selected Site—**This selection permanently removes the selected site. The *union* site record may *not* be deleted. Records currently assigned to the selected site will be reassigned to the *union* site after deletion; all settings and preferences will be permanently deleted.
- **Duplicate Selected Site—**This selection allows you to make copies of the currently highlighted (i.e. selected) site.

Operation Management—Opens the **Operation** management window in an external browser window; see page 37 for more information.

Online Help—Performs a **Site Management** window help query to our Online Help in an external browser window.

Current Record Pane (Continued)

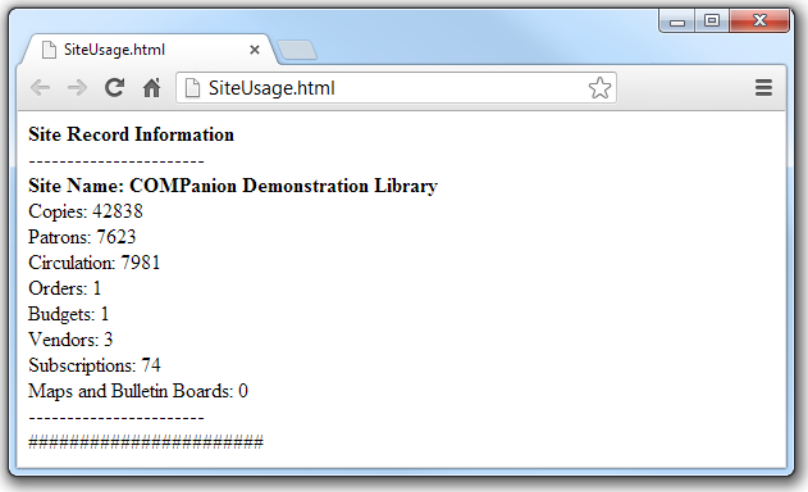
This portion of the **Site Management** window is *always* visible regardless of which site you have selected from the **Site Records List**. Here you'll provide basic information about your site: administrator name along with the site address, email, telephone and fax numbers.

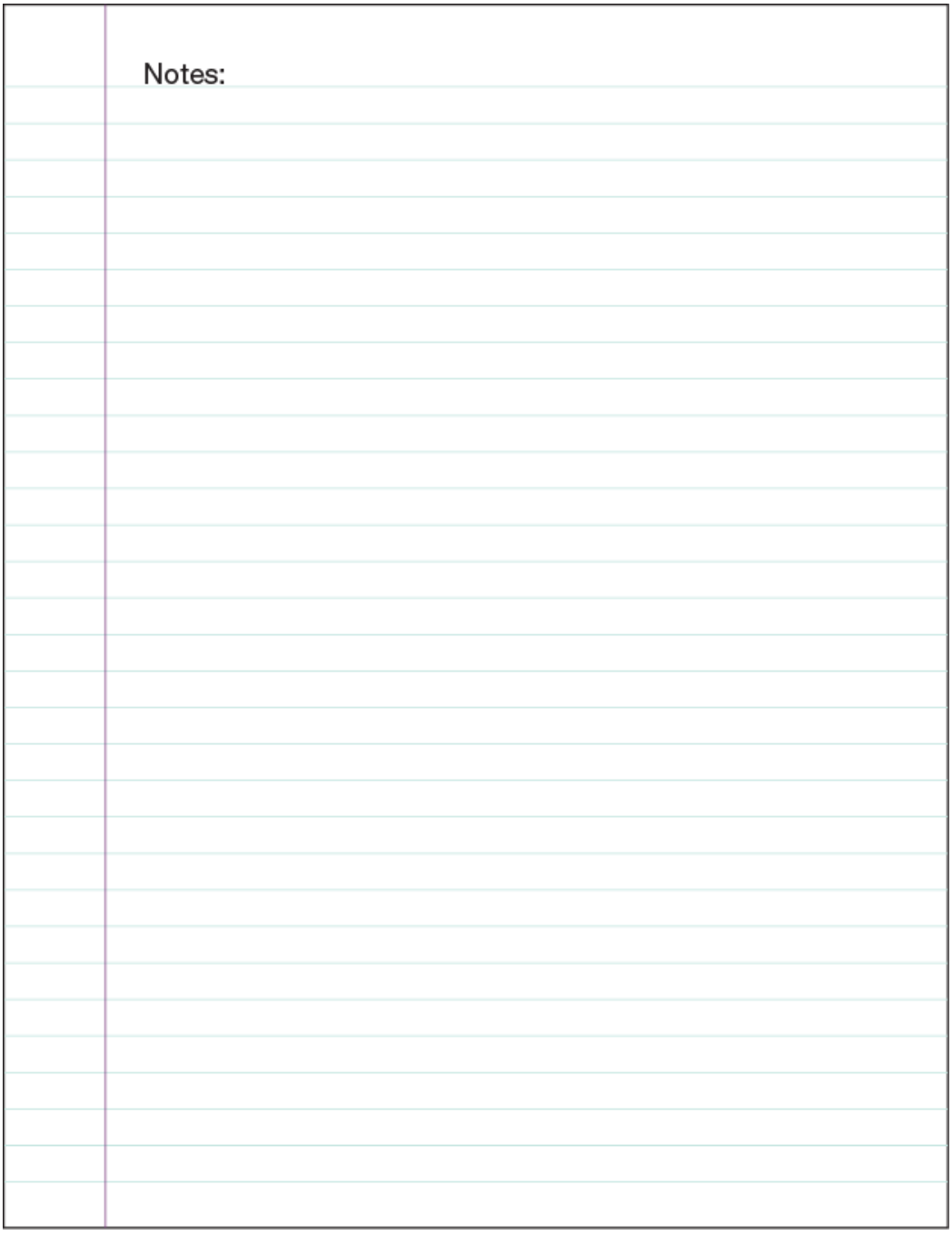


Site Settings

- **Administrator Name—** Enter the name of the current site's administrator or head librarian here; this is the name that appears at the bottom of form letters.
- **Address Information—** Enter the site address, city, state, postal code, and country; this data is used for return addresses on patron notices, for information shown on the Researcher, and is included in emails sent to COMPanion's Technical Support team. This address information will also be used as defaults when creating a new patron if no city, state, postal code, or country information is specified.
- **Site ID Code—** This identifier is used to tag various record types including **Patrons** and **Items**. Other areas affected by the **Site ID Code** include **Orders**, **Budgets**, **Vendors**, **Subscriptions**, **Routes**, **Maps**, and **Bulletins**.

- **Site Name—**Enter the name of your site (e.g. COMPanion Demonstration Library). The *union* site name is registration-controlled and can *not* be changed; Please contact the COMPanion Sales department at *(800) 347-6439* if you need to change your *union* site name.
- **Administrator Title—**The site administrator's title. For example, "Librarian", "Director of Media", "Library Specialist", or "Teacher"; this title can also be included on form letters.
- **Telephone—**Provide the telephone number for the site's main desk or office.
- **Email—**This is the site's email address, which is used as the return mail address for overdue notices and other email messages sent by Alexandria. To guarantee that your email notifications are being sent, please check the list of requirements located under your **Email** settings *(see page 151)*. You must enter a valid email address to use most email services, including COMPanion's Technical Support services.
- **Fax—**If applicable, provide this site's fax number.
- **Researcher Notice—**Any text you enter in this field will be displayed when you click on the **Site Information** link in your Researcher. Describe your library hours (e.g. *9:00 a.m. - 6:00 p.m. Monday through Friday*) with any combination of numbers and hours. If you decide to leave this field blank, the text "`Library Hours Not Specified`" will appear in the **Site Information** section of your Researcher *(see page 151)*.
- **Notes—**An optional notes field where you can provide *any* supplementary information about your managed sites.
- **Usage Report—**Clicking this generates an `.html` **Site Usage** report, detailing usage statistics for all the sites (or single site) in your union. This report includes how many copies, patrons, circulation transactions, orders, budgets, vendors, subscriptions, maps, and bulletins have accumulated per site.




Notes:

Introduction to Preferences

Alexandria® Hosted Service

Setting Up Alexandria

Now that you've established your sites, it's time to configure Alexandria!

Alexandria may *seem* overwhelming at first, but as you experiment and explore, you will gradually grow more comfortable—especially once you've familiarized yourself with the standardized layout of management windows and the location of important preferences and frequently used features.

Although Alexandria is highly configurable and can be adapted to accommodate nearly every conceivable library environment, the scope of this *Getting Started Guide* is *not* to cover every possible procedure or preference option. If we provided exhaustive documentation for every single configurable preference and setting available—you'd undoubtedly fall comatose before making it to the end.

Breaking Alexandria down into manageable chunks can make the task seem much less arduous; therefore, the preferences detailed in this *Getting Started Guide* are dished out in bite-sized chapters that effortlessly guide you through the basics and help lighten the initial learning curve.

However, we realize that no two individual sites are the same and uncommon circumstances do exist where users with special needs require advanced features and targeted instructions in order to get set up properly.

For these individuals, we recommend going straight to Alexandria's Online Help *(www.companioncorp.com/mediawiki/index.php)* to review comprehensive documentation about our various preferences, configurations, modules, expanded services, search add-ons, and clients; it thoroughly covers each and every one of them, including advanced techniques for unique and uncommon scenarios.

An Introduction to Preferences

Alexandria's settings and preferences may be adjusted to make changes to the system and its behavior; the current chapter will outline those more essential to get your software up and running while the subsequent chapters will cover these settings more thoroughly.

Alexandria settings and preferences come in four basic varieties:

- **Administration** settings *(not covered here; see page 57)* apply to the entire union and provide valuable information about your library system; including how your patrons access the catalog, whether email notices can be sent, and essential maintenance configurations. These settings should be reviewed before *any* other preferences or circulation has been performed.

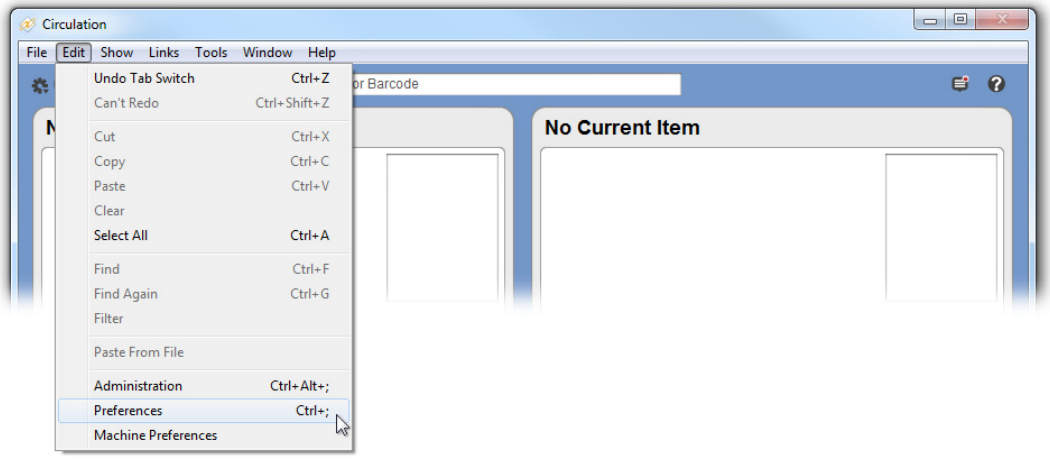
- **System** preferences are settings that are configured the same way for *every* client workstation connected to the hosted Data Station. If your permissions allow, changing **Preferences** on a Librarian Workstation will also change them on the main (i.e. **Union**) hosted Data Station.
- **Site** preferences allow individual, customized control over settings that may be unique for each specific site.
- **Machine** preferences apply to a single computer. For example, only one of several library computers may have an attached slip printer or cash drawer; hence, **Slip Printer** preferences will appear in *that* workstation's **Machine Preferences** window.

Regardless if they're considered **System** or **Site**, preferences determine how your patrons use the library, how your items are managed, and how your library operates; they are used to customize Alexandria's circulation settings, default values for barcodes, settings for cataloging, and restrictions for Researchers and Librarian Workstations.

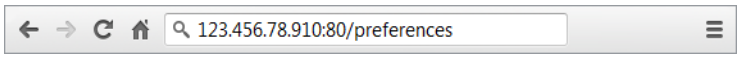
You also use preferences to configure your library policies (i.e. the rules that dictate how your resources are used). You can set policies that determine how each item in your collection circulates and how certain patron groups are allowed to use your library. You can also configure policies that determine how long an item can be checked out, how long a hold request can be kept, etc.

Accessing Preferences

To set up or change Alexandria preferences, you must first open either the **Preferences** (Cmnd/Ctrl+;) or **Administration** (Opt+Cmnd+; / Ctrl+Alt+;) window(s) using the **Edit** menu.



Alternatively, type the IP/DNS and port number of your hosted Data Station (e.g. "`123.456.78.910:80`") followed by "`/preferences`" into your web browser's **Address** field (usually located in the upper-left corner of the window).



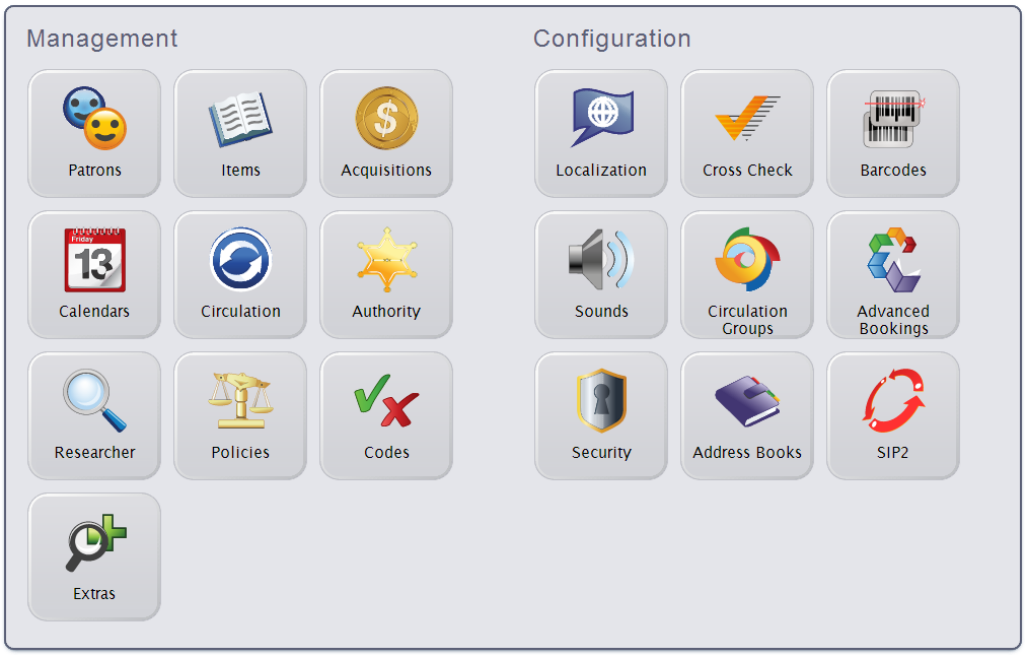
If you are not sure what IP address (or domain name) your hosted Data Station uses:

- On a Librarian Workstation, the web address of your installed Data Station can be seen at the top of the **Circulation** window.
- It also appears in the **Transaction Log** of the main **Circulation** window each time the Librarian Workstation is launched; approximately three or four lines down.
- You can locate your IP address under the **Network** header in the **System Info** subtab of the **Special** tab of the **Circulation** window.
- You can also locate your IP address (or domain name) in the **Administration Status** settings tab *(see page 59)*.

If you are still having problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact COMPanion's Technical Support team at *(800) 347-4942* or by email via: `support@companioncorp.com`.

The Preferences Window

Alexandria's **Preferences** are organized together in an easy-to-use and easily-identifiable layout divided into the following two categories: **Management** and **Configuration**. Once the **Preferences** window appears, click on the corresponding icon(s) to view the available preference settings.



Please keep in mind that some preferences may not be available for certain clients; your hosted Alexandria Data Station may have more preferences available than a Librarian Workstation. Some preferences are only active after you have licensed them (e.g. certain vendors in **Extras**).

Administration Settings and Management/Configuration Preferences

Although this is not an exhaustive list of *every* single setting and preference tab in their entirety, the following provides a summary for each preference that COMPanion *recommends* you initially set and the order in which you should configure them. Review the subsequent preference chapters for additional information on how to configure these settings.

COMPanion generally recommends that you configure your **Preferences** in the following order:

Site Management

1. **Site Management—**Although not found in either **Administration** or **Preferences** modules (therefore, not *truly* preferences), know that it is *absolutely crucial* to configure your sites before doing anything else—especially those operating in a Central Union environment. In order for an item or patron to exist in your database, they *must* belong to a site; therefore, accurate site records are *essential*.

Administration Settings

2. **Email—**These settings are used to determines how Alexandria uses external email services *(see "Administration: Email Settings" on page 61)*.

Configuration Preferences

3. **Security—**These preferences are used to create and manage operator access levels. An operator's security level determines what actions they are allowed to perform and the areas of the program to which they have access *(see "Security Preferences" on page 65)*.

4. **Localization (Terminology & Language)—**These preferences allow those who use Alexandria outside of the United States to have complete customization over their local vocabulary and currency standards *(see "Localization Preferences" on page 89)*.

5. **Address Books—**These preferences are used to configure address books for wide-area or multi-collection access *(see "Address Book Preferences" on page 73)*.

6. **Barcodes—**These preferences are used to configure how Alexandria should increment new patron and item barcode numbers *(see "Barcodes Preferences" on page 131)*.

Management Preferences

7 **Calendars—**These preferences are used to set up calendars used at your site; schedule open days, closed days, period due dates and more *(see "Calendar Preferences" on page 95)*.

8 **Policies—**These preferences establish rules that regulate how library resources are used by patrons; this includes how items circulate, how long items may be checked out, how much overdue fines cost, whether an item can leave the building, how circulation periods are computed, and so forth. Policies are an essential part of successful circulation, reports, and statistics *(see "Policy Preferences" on page 99)*.

9 **Circulation—**These preferences configure information about patron lexiles, create text for inclusion in the body of patron notices *(see "Circulation Preferences" on page 135)*, etc.

10 **Patrons—**These preferences are used to configure information about library patrons, such as: default patron barcodes, default policy, and grade tables *(see "Patrons Preferences" on page 111)*.

11 **Items—**These preferences are used to configure general information about pretty much *anything* that circulates: default item barcode ranges, barcode leaders, default policies, terminology, catalogue settings, subject sources, medium pictures, and leading articles *(see "Items Preferences" on page 119)*.

12 **Researcher Modules—**These preferences define initial settings for your Researcher *(see "Researcher Preferences" on page 149)*.

Administration Settings

Status

Web

Database

Email

LDAP

Checkpoint ILS

With **Administration** settings, you can perform immediate archives, database maintenance (i.e. rebuilds), and web/email settings.

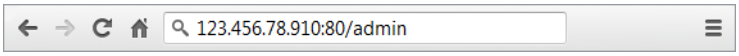
These settings are high-level preferences intended for network administrators, IT Technology Support departments, or operators with **Administrator**-level permissions; in other words, advanced settings to be configured once and then be forgotten.

Although operators with the proper security permissions can access the **Administration** module, it generally contains settings that most operators wouldn't be able to configure without help.

An operator's access to these settings is governed by the **Data Station Management** drop-down menu found in the **Management** tab of your **Security Preferences** *(see "Security Preferences" on page 65)*.

How to Access Administration Settings

To access Alexandria's **Administration** settings, type the IP address (or server domain name) and port number of your hosted Data Station (e.g. "`123.456.78.910:80`") followed by "`/admin`" into your browser's **Address** field (usually located in the upper-left corner of the window).



If you are not sure what IP address (or server domain name) your hosted Data Station uses:

- It appears in the **Transaction Log** of the main **Circulation** window each time the Librarian Workstation is launched; approximately three or four lines down.
- You can locate your IP address under the **Network** header in the **System Info** subtab of the **Special** tab of the Librarian Workstation's **Circulation** window.
- If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact COMPanion's Technical Support team by calling *(800) 347-4942* or via email at *support@companioncorp.com*.

Step-by-Step: Essential Administration Settings

Step 1. Select **Administration** (Cmnd/Ctrl+Alt+;) from the main **Edit** menu bar. Alternately, type the IP address (or server domain name) and port number of your hosted Data Station followed by "`/admin`" into your browser's **Address** field.

Step 2. The **Administration** window will open in your default web browser.

Step 3. Click on the **Email** icon in the **Administration** window sidebar.

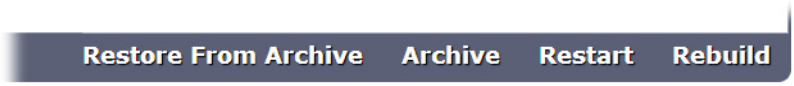
Step 4. If you want to send outbound email notifications, you must configure how Alexandria communicates with your external SMTP server. Therefore, you must provide both a valid site **Email** address *(see "Site Settings" on page 48 for more information)* and a valid **Email** address for one of your **District Administrator** operators *(see "Patron Management" on page 271)*.

Step 5. Supply your **SMTP Server Address** and **Port** information; if **Use Authentication** is required, check that box and provide your **Log In** and **Password**. Also, enable the **Use SSL** setting if needed.

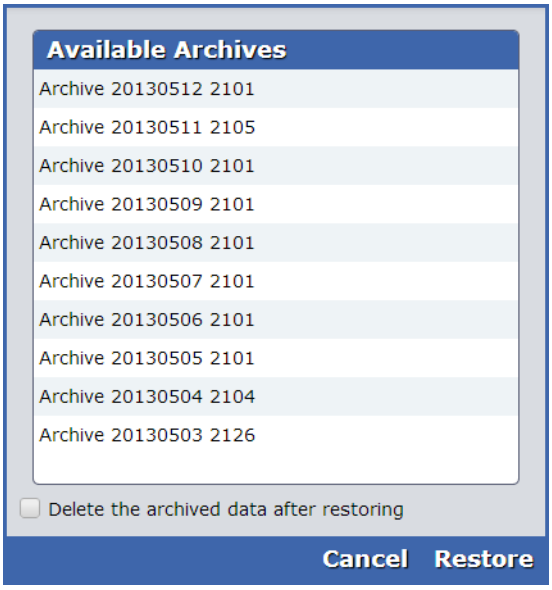
Step 6. After you properly configure each of your **Administration** settings, be sure to click on **Save** in the upper-right corner of the window.

Administration: Status Settings

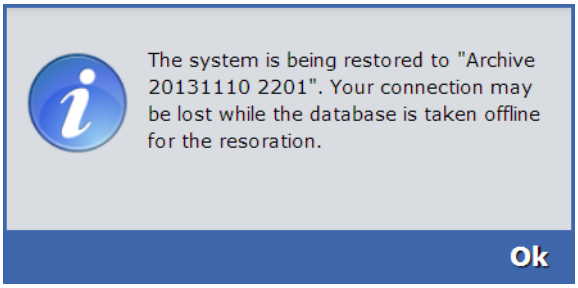
Although there's more to the **Administration Status** settings than are mentioned here, we're only interested in the convenient shortcuts to the utilities that are located in the toolbar at the bottom of the window and how these relate to the previously discussed archives and rebuilds.



- **Restore From Archive—**If you would like to restore your data from a previously created archive, click the **Restore From Archive**[1] button; this will cause the **Available Archives** roll-down to appear. From this list, select (highlight) the archived data you'd like to restore from; data archives are listed in newest-to-oldest order.



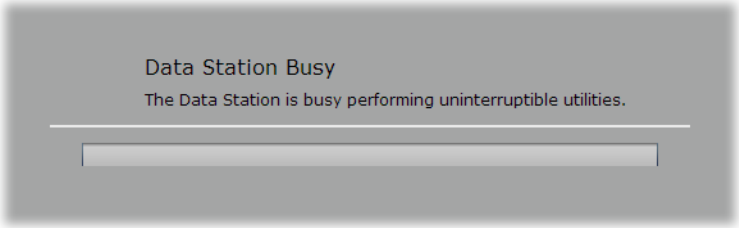
Once you have selected the correct archive to restore, click **Restore**. A warning message will appear, asking if you're absolutely sure you'd like to continue; click **Yes** to continue or **No** to cancel.


The system is being restored to "Archive 20131110 2201". Your connection may be lost while the database is taken offline for the resoration.
Ok

1.Clicking **Archive** or **Restore From Archive** can initiate the **Remote Control** window.

If you continue, your current data will be replaced by that contained in the selected archive folder. You may also check the **Delete the archived data after restoring** box if you would like to remove the selected archive from the hosted **Archive Directory** upon successful restoration. Finally, click **Cancel** to abort or **Restore** to continue. You'll be able to verify that you've successfully restored from an archive in Alexandria's **Transaction Log** (single-site only; page 226).

- **Archive—** This performs an *immediate*, manual archive of your database; manual archives should be performed before making any large-scale changes to your database, such as imports, updates, utilities, or machine upgrades. During an archive, all information in the hosted Data Station's **Data** folder is copied into the hosted **Archive Directory**. Additionally, *all* library services on the hosted Data Station are temporarily disabled[1].



Automatic archives in Alexandria is a hands-off affair. Because your Data Station is hosted, nearly all of your **Administration** settings have already been configured to make complete, regular copies or your valuable Alexandria **Data** folder for you—stored on the hosted server. Hosted users are unable to disable or change the number of archives to keep or the location of the **Archive Directory**.

- HOST-IT-NOTE -
Because your Data Station is hosted, nearly all of your **Administration** settings have already been configured to make complete, regular copies or your valuable Alexandria **Data** folder for you—stored on the hosted server.

- **Restart—** This allows you to restart the hosted Data Station remotely. During the restart duration, Alexandria services and modules will be unavailable to all operators[2].

- **Rebuild—** This performs an *immediate*, manual rebuild of your hosted database; this will examine your database files and indexes and then perform **Patron**, **Item**, and **Circulation** verification routines. If database damage is detected, it's automatically fixed.

1. If any clients are connected, the **Remote Control** window will appear.
2. **Remote Control** services will send out a warning to all operators and every **Librarian** workstation will have to approve in order for the Data Station to be restarted.

Administration: Email Settings

- NOTE -
These **Web** settings only appear for those running a Central Union, Distributed Union, or an independently operated Data Station in a Distributed Union (i.e. single user). **Administration Web** settings apply to all sites and contain configurable settings for the entire union.

Email Rules and Basics

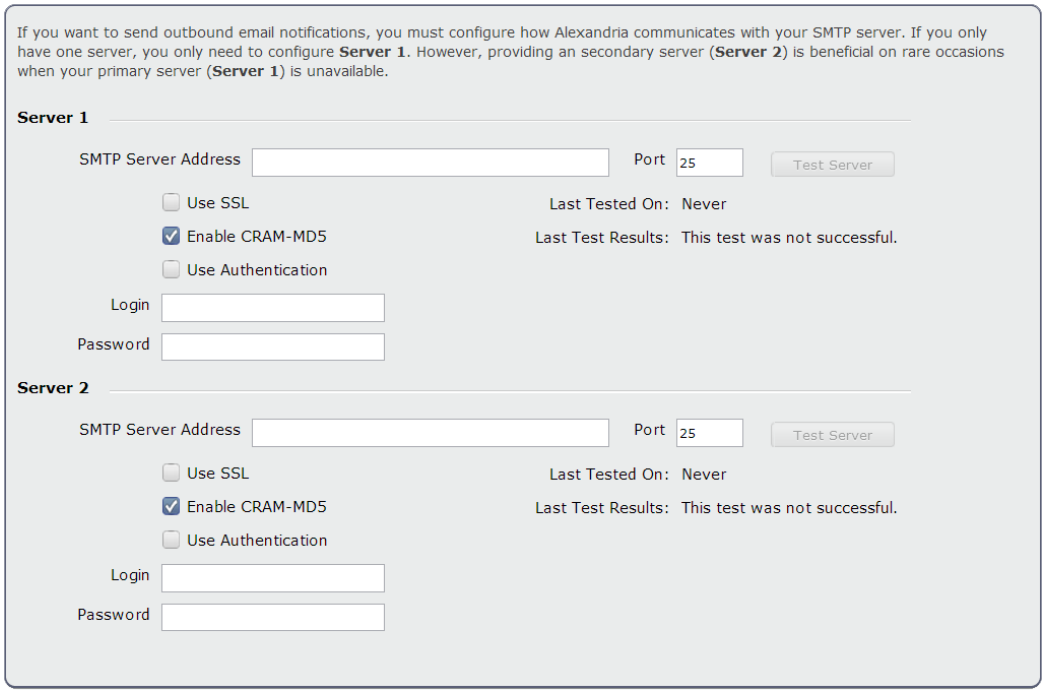
The way our email system was designed and configured is not quite like that of a personal email client—which rarely sends out more than a few emails at a time; it was designed to potentially cope with *hundreds* of emails (e.g. generated reports or patron notification) being sent (or resent) over *many* machines at the same time. Our email throttling defaults are quite effective at spreading out and resending dozens of undeliverable emails without interfering with the sends of those that *are* deliverable.

If a send fails, the next resend time is generated by adding a random value between *3* and *9* minutes, spreading out the resend times so all the undelivered email still in the "short range" period isn't sent at the same time. If a send hasn't succeeded by the end of the "short range" period, the program will generate new send times using random values between *60* and *90* minutes. This is useful because, in most cases, an undeliverable email can usually be delivered a few minutes later; on the flip side, if an email isn't delivered within the first hour, it might take several hours (or even days) to be successfully delivered. If it still hasn't succeeded after *100* hours (generally referred to as the "give-up" time by the RFC[1]), the email is discarded and a "return-to-sender" email will be sent.

1.RFC is short for Request for Comments, typically an IETF (Internet Engineering Task Force) memorandum describing methods, behaviors, standards and protocols, research, or innovations applicable to the working of the Internet and Internet-connected systems.

Email Settings

Use the **Email** settings to configure how Alexandria communicates with your library's email server. This is required if you intend to email letters and notices from within Alexandria. We recommend that you seek assistance from your IT staff when configuring your **Email** settings.


If you want to send outbound email notifications, you must configure how Alexandria communicates with your SMTP server. If you only have one server, you only need to configure Server 1. However, providing an secondary server (Server 2) is beneficial on rare occasions when your primary server (Server 1) is unavailable.
Server 1
SMTP Server Address
Port
25
Test Server
Use SSL
Last Tested On: Never
Enable CRAM-MD5
Last Test Results: This test was not successful.
Use Authentication
Login
Password
Server 2
SMTP Server Address
Port
25
Test Server
Use SSL
Last Tested On: Never
Enable CRAM-MD5
Last Test Results: This test was not successful.
Use Authentication
Login
Password

The SMTP **Server 1** and **Server 2** sections are used for out-bound email. The **Test Server** button will send a test email using your provided SMTP settings. Please contact COMPanion's Technical Support at *(800) 347-4942* or via email at *support@companioncorp.com* if you have additional questions about setting up your mail server.

- **Server 1** and **2**—This is the TCP/IP or DNS address of your library's mail server. Typically, this will be "`mail.`" followed by your domain name. You must enter a valid **SMTP Server** address to use email services.

- **Port**—Supply the port number that your email server uses.

- **Use SSL**—Check this box to use Secure Sockets Layer security protocols.

- **Enable CRAM-MD5**—Uncheck this box only if you want to prevent the email service from using the CRAM-MD5 authentication method, quite often supported by *SMTP-AUTH Mail submission agents*. If present, this setting applies to the secondary server as well.

- **Use Authentication—** Check this box to use authentication with this SMTP server. Checking this box will make the **Log In** and **Password** fields editable.

  Log In— Enter the login (user identification) for the email server.

  Password— Enter the password for the email server.

- **Test Server—** Test the **SMTP Server** settings by sending a test email.

- **Last Test—** This field displays the last date/time that the server test was performed and whether the test was successful or not.

Step-by-Step: Setting Up Your SMTP Server

These step-by-step sections are intended for new or first time operators who need to know which initial settings we recommend they configure.

Step 1. Go to **Edit** on the main menu bar and select **Preferences** (Cmnd/Ctrl+Alt+;).

Step 2. Click on the **Email** icon in the **Administration** window sidebar.

Step 3. To successfully use an external SMTP, you must provide both a valid **Site Email Address** and a valid **Email Address** for one of your Administrator-level operators.

Step 4. Supply your **SMTP Server** information, **Port**, and, if **Use Authentication** is needed, check that box and provide your **Log In** and **Password**. Also check **Use SSL** if needed.

Step 5. Click **Save** in the upper-right corner of the window.

Using Gmail as Your SMTP Server

One of the little-known freebies **Gmail** offers is a portable SMTP server to send mail from any network for any email address.

Step 1. Select **Administration** (Cmnd/Ctrl+Alt+;) from the **Edit** menu.

Step 2. Next, click on the **Email** icon located in the **Administration** sidebar.

Step 3. In the **Email** settings, type the following address into the **SMTP Server** field: *smtp.gmail.com*

Step 4. Be sure that the **Port** field is configured as: *465*

Step 5. Make sure that the **Use SSL** box is checked.

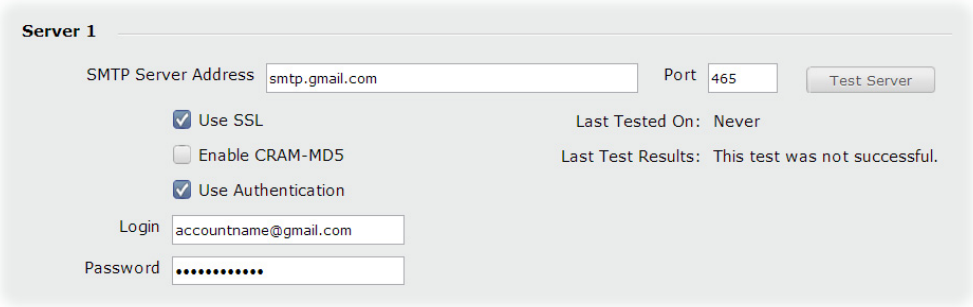
Step 6. Make sure that the **Enable CRAM-MD5** box is *not* checked.

Step 7. Next, check the **Use Authentication** box and provide your Google email account name in the **Login** field.

Step 8. Provide your Google email password in the **Password** field.

Step 9. Finally, in order to use Gmail as your SMTP server you will need to click on the **Test Server** button and verify that a test email was successfully sent to the email address of the administrator responsible for the SMTP server; this email address is specified in the **Site Management Email** address *(see "Site Settings" on page 48 for more information)*.

Step 10. *Voilà!* Using your Gmail account, you can now send email to *any* email address from *any* network that lets you connect to an outside SMTP server.



Security Preferences

Security Preferences allow operators (with the appropriate authority) to modify existing or create their own custom security groups by manipulating lists of permissions organized by tab; these tabs include: **Management**, **Tools**, **Circulation**, **Preferences**, **Reporting**, and **Researcher**. In turn, these **Security Groups** (assigned to individuals using the **Patron Management** window; see page 273) determine what actions operators or patrons are permitted to perform. By default, **Administrator**-level access are the only security groups that allows you to do this.

When a new patron is added to Alexandria, their *default* **Security Group** will be **Patron**. However, you may need to change their **Security Group** to one that has more (or less) privileges.

The *very* first operator that you should create is the **District** or **Library Administrator**. Do not forget to create a **Username** and **Password** for this operator since it must be used to examine, edit, add, or delete other patrons or operators and address books.

If you haven't yet created a **District Administrator** for your union site, the very first time that you attempt to access the program or one of its online components (e.g. `/preferences`), you will be tasked with creating an **Administrator**-level operator that may be later edited, but never removed. Your first operator *needs* to be a **District Administrator** with the equivalent **Security Group** access.

The **District Administrator** security group has access to *all* sites and is only meaningful for Central Union multi-library collection licenses; for all other licenses, the **District Administrator** security group is analogous to the **Library Administrator**. By default, the **Library Administrator** is assigned to a *single* site; however, this can be adjusted to allow access to additional sites.

HINT:
You may select **Restart** or **Log Out** from the **File** menu to access Alexandria as an operator with a different **Security Group**.

NOTE:
By default, only the **District** and **Library Administrator** can add custom or edit existing security groups.

Security Groups List

The left pane of the window contains the default and custom **Security Groups** that can be assigned to operators and patrons in the **Patron Management** window. Operators with the appropriate authority can add, duplicate, edit, or remove any of Alexandria's security groups with the exception of the default security groups, which *can* be edited (except for **District Administrator**), but *not* removed or renamed.

After you have successfully created/duplicated a new security group, it will appear in *this* list.The area situated below the **Security Groups** list contains several tool icons that are used for adding, removing, editing, and renaming security levels

Add—Clicking on the **Add** ("**+**") button triggers the **Create New Security Group** roll-down. This allows you to create a new security group that isn't based on any that currently exist. For more information on how to create new **Security Groups**, see page 69.

Remove—Those with the appropriate authority can remove an operator-created security level by highlighting (selecting) the group from the **Security Groups** list in the **Security Preferences** window and clicking the **Remove** ("**—**") button. You will *not* be able to remove any of Alexandria's default security groups. For more information on how to remove **Security Groups**, see page 72.

Actions—This menu, located on the lower-left corner of the **Security Preferences** window, allows you to **Rename** or **Duplicate** any of the selected (highlighted) security groups.

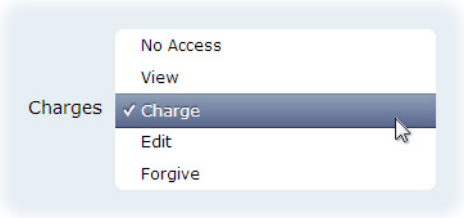
- **Duplicate—**If you would like to create a new security group based on an existing security group and its list of *enabled* and *disabled* security options, see page 70 for more information.
- **Rename—**This selection triggers the **Rename Security Group** roll-down, allowing you to provide a new security group name. Each security group name *must* be unique. Also, you are unable to change the names of Alexandria's *default* security groups. See page 71 for more information.

Security Group Permissions

On the right side of the window, security privileges are compartmentalized into groups of similar permissions. You may toggle between these categories using the **Management**, **Tools**, **Circulation**, **Preferences**, **Reporting**, **Researcher** tabs that cross the top of the **Security Preferences** window[1]. Each tab refers to a particular set of permissions:

- **Management—**The permissions contained within define how operators are allowed to access and interact with Alexandria's management windows; these include **Patron**, **Item**, **Advanced Bookings**, and acquisitions—just to name a few.
- **Tools—**The permissions contained within dictate whether operators are allowed to access tools and management windows such as **Inventory**, **Authority Control, Sites**, **SIF**, and **Operation Management**.
- **Circulation—**The permissions contained within dictate whether operators are allowed to access and edit charges, refunds, payments, reservations, holds, and other transaction services.
- **Preferences—**The permissions contained within dictate whether operators are allowed to access and edit **Preferences**, **Machine Preferences**, and **Policies** settings.
- **Reporting—**The permissions contained within govern what report types operators are allowed to view, add, edit, or remove.
- **Researcher—**The permissions contained within relate directly to how operators and patrons are allowed to interact with your Researcher *(see page 151)*.

Utilizing the drop-down menus contained in each tab, you can *enable* or *disable* specific security privileges for the existing security group. When a particular permission is selected, operators assigned that **Security Group** will be able to perform all the functions listed *above* that selected permission. For example, if **Charge** is selected, the operator may both **View** and **Charge** fines. If **Forgive** is selected, the operator will be able to **View**, **Charge**, **Edit**, and **Forgive** charges.



When you have finished editing all of your security permissions, click **Save** to keep your changes or **Revert** to discard them. You will be required to **Save** or **Revert** before configuring any other security groups.

1.For more comprehensive information about these tabs, please review the *"Security"* section of Alexandria's Online Help.

Default Security Groups

Alexandria comes standard with several default **Security Groups**; from **District Administrator** to **Self-Service**. **District Administrator** is the least restrictive and allows unlimited access to Alexandria preferences and settings. **Student Aide** is the most restrictive security group, only allowing users to search the database.

Below are the default security groups available in Alexandria. Each of these default security groups *can* be edited; however, they can *not* be deleted or renamed.

- **District Administrator—** Full access to every control and setting within Alexandria, including the ability to examine and change registered operators. Operators at this level can edit district level preferences and have access to *all* library preferences. All other access levels can only modify records from their assigned library collections. The **District Administrator** security group can *not* be removed or modified.
- **Library Administrator—** Full access to every control and setting within Alexandria, including the ability to examine and change registered operators. Operators with this security level can only edit preferences for their assigned collections.
- **Librarian—** Full access to every control and setting within Alexandria except the ability to examine registered operators and **Address Books**.
- **Library Staff—** Access to all system functions and reports except **Preferences**, **Imports** and **Utilities**.
- **Library Aide—** Access to Web Librarian and Librarian Workstations and standard circulation commands, with the authority to allow restricted actions. For example, if a patron has too many books issued, a warning message appears when the patron tries to check out another book. This security group allows a library aide to override a policy restriction and allow a patron to check out another book.
- **Student Aide—** Access to Web Librarian and Librarian Workstations and standard circulation commands, but no authority to allow restricted actions such as policy overrides (as described in the **Library Aide** example above)
- **Self-Service—** Supports **Student Aide** privileges with the addition of **Check In** and **Bookdrop** circulation commands and the bookdrop capability. The **Circulation** window is allowed for **Bookdrop** mode only *(see "Bookdrop Mode (B)" on page 239)*. At this security level, overdue fines are automatically recorded with no opportunity to accept payment, or forgive/adjust fines. Fines are still displayed in the transaction log.

- **Patron—** This is the default security group for all newly created patrons. It can *not* be deleted. The only settings that can be modified in this security group are on the **Researcher** tab.
- **Patron Limited—** For convenience, this patron-level security group is essentially the same as the **Patron** level, but you are allowed to modify the **Management**, **Circulation**, **Preferences**, and **Reporting** tabs along with the **Researcher** tab.

Step-by-Step: Creating A New Security Group

This roll-down allows you to create your own custom security group; it can be accessed by clicking the **Add** ("**+**") button located in the lower-left corner of the **Security Groups** list.

To add a new security group:

Step 1. From the **Edit** menu, select **Preferences** (Cmnd/Ctrl+;).

- or -

Type the IP address (or server domain name) and port number of your hosted Data Station followed by "`/preferences`" into your browser's **Address** field (e.g. `http://123.456.78.910:80/preferences`).

Step 2. Click the **Security** icon in the **Configuration** section of the **Preferences** window.

Step 3. Click the **Add** ("**+**") button located in the bottom-left corner of the **Security Groups** list. The **Create New Security Group** roll-down will appear.

Step 4. Enter the name for your new security group (e.g. `Patron w/Reviews`).

Step 5. Next, determine whether you want all security access *on* or *off* by default; some operators will find it easier to have all of their security options enabled or disabled when creating a new security group from scratch. Choose **All On** to have all access turned on or **All Off** to have all access turned off.

Step 6. Click **Add** to create your new security group and add it to the **Security Groups** list. From this point on, you may treat the newly created security group as you would any existing security group; it may be edited, duplicated, or completely removed.

Step 7. Further customize your new security group using the **Management**, **Tools**, **Circulation**, **Preferences**, **Reporting**, **Researcher** tabs that cross the top of the window. By configuring the drop-down menus contained within these tabs, you may grant or restrict individual security privileges.

Step 8. When you are finished, click **Save** to keep your changes or **Revert** to abandon them.

Step-by-Step: Duplicating A Security Group

If you would like to create a new security group based on an existing group and its list of *enabled* and *disabled* security options, select (highlight) the security group that you would like to have duplicated from the **Security Groups** list, and select **Duplicate** from the **Actions** menu.

To duplicate an existing security group:

Step 1. From the **Edit** menu, select **Preferences** (Cmnd/Ctrl+;).

- or -

Type the IP address (or server domain name) and port number of your hosted Data Station followed by "`/preferences`" into your browser's **Address** field (e.g. `http://123.456.78.910:80/preferences`).

Step 2. Click the **Security** icon in the **Configuration** section of the **Preferences** window.

Step 3. Next, select **Duplicate** from the **Actions** drop-down menu located at the bottom-left of the **Security** tab. The **Duplicate Security Group** roll-down will appear.

Step 4. Enter the name for your new security group (e.g. `Volunteer Aide`).

Step 5. After you have successfully duplicated an existing security group, it will appear in the **Security Groups** list. From this point on, you may treat the newly duplicated security group as you would any existing group; it may be edited, duplicated (again), or completely removed from the system.

Step 6. Further customize your duplicated security group using the **Management**, **Tools**, **Circulation**, **Preferences**, **Reporting**, **Researcher** tabs that cross the top of the window. By configuring the drop-down menus contained within these tabs, you may grant or restrict individual security privileges.

Step 7. When you are finished, click **Save** to keep your changes or **Revert** to abandon them.

Step-by-Step: Editing A Security Group

To edit an existing (custom or default) security group, select (highlight) one of the **Security Groups** from the **Security** preference window. Next, make changes to the drop-down menus contained in the **Management**, **Tools**, **Circulation**, **Preferences**, **Reporting**, **Researcher** tabs that cross the top of the window. These drop-down menus can be used as a reference to see how certain security groups operate or to quickly change a specific privilege on several different security groups.

You may also edit the name of the current security group by selecting **Rename** from the **Actions** menu. Doing so will trigger the **Edit Security Group** roll-down. Input the new security group name and click **OK** when you are satisfied with your changes. You will be unable to change the names of Alexandria's *default* security groups and each security group name *must* be unique.

To edit an existing security group:

Step 1. From the **Edit** menu, select **Preferences** (Cmnd/Ctrl+;).

- or -

Type the IP address (or server domain name) and port number of your hosted Data Station followed by "`/preferences`" into your browser's **Address** field (e.g. `http://123.456.78.910:80/preferences`).

Step 2. Click the **Security** icon in the **Configuration** section of the **Preferences** window.

Step 3. From the **Security Groups** list, select (highlight) the security group whose privileges you would like to edit.

Step 4. Next, make the desired changes (either grant or restrict security privileges) using the drop-down menus contained in the **Management**, **Tools**, **Circulation**, **Preferences**, **Reporting**, **Researcher** tabs that cross the top of the window.

Step 5. You may also edit the current security group by selecting **Rename** from the **Actions** menu. Doing so will trigger the **Rename Security Group** roll-down.

Step 6. Input the new security group name and click **OK**. You are unable to change the names of Alexandria's *default* security groups; also, each security group name *must* be unique.

Step 7. When you are finished, click **Save** to keep your changes or **Revert** to abandon them.

- NOTE -
The default **District Administrator** security group can *not* be edited.

Step-by-Step: Removing A Security Group

You may remove the currently selected security group by clicking the **Remove** ("**—**") button. Operators will be asked if they are sure they would like to remove the selected security group; click **OK** to proceed or **Cancel** to abort the removal. Operators will *not* be able to remove any of Alexandria's default starting security groups. Once a security group has been deleted, it can *not* be restored.

To remove an existing security group:

Step 1. From the **Edit** menu, select **Preferences** (Cmnd/Ctrl+;).

- or -

Type the IP address (or server domain name) and port number of your hosted Data Station followed by "`/preferences`" into your browser's **Address** field (e.g. `http://123.456.78.910:80/preferences`).

Step 2. Click the **Security** icon in the **Configuration** section of the **Preferences** window.

Step 3. From the **Security Groups** list, select (highlight) the security group you would like to remove.

Step 4. Click the **Remove** ("**—**") button.

Step 5. You will be asked if you are sure you would like to remove the selected security group; click **Yes** to proceed or **No** to cancel. You will *not* be able to remove any of Alexandria's default security groups.

Step 6. When you are finished, click **Save** to keep your changes or **Revert** to abandon them.

Address Book Preferences

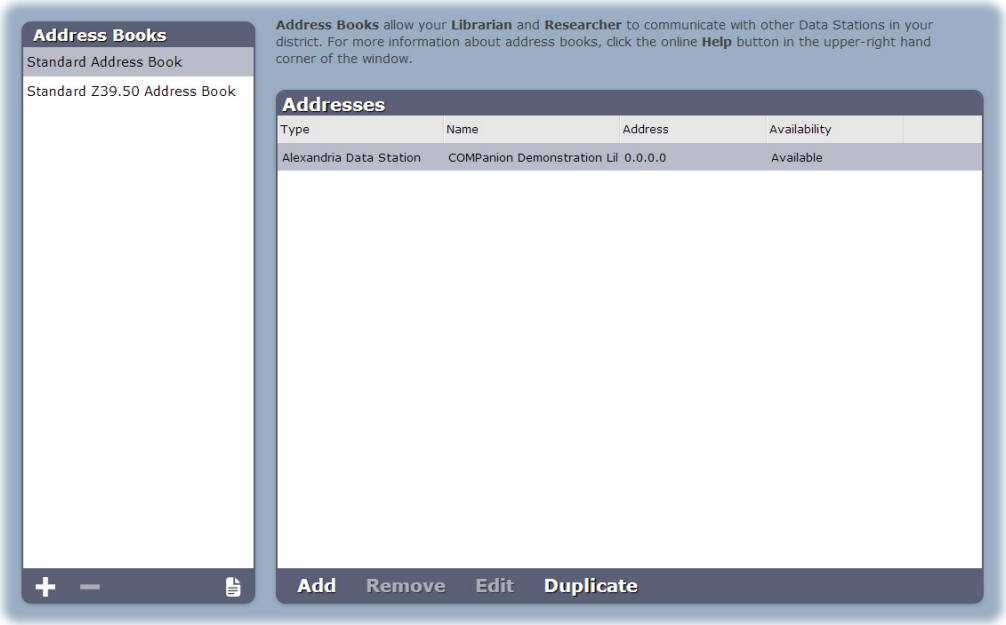
Alexandria® Hosted Service

> **- NOTE -**
>
> In a Central Union environment, only the sites defined in your **Site Management** window can be selected from the Researcher's **Library Search** menu. You no longer have the ability to perform site-specific searches in a Central Union other than your own.
>
> Although the wide area network (WAN) feature still exists for single-site licenses, it is no longer compatible with Central Unions.

Getting Started With Address Books

Alexandria's **Address Books** are mainly used to store Alexandria or Textbook Tracker Data Station IP addresses. If you are *not* part of a Central Union and are licensed to use our wide area network (WAN) feature, you can search these addresses from the Researcher or reference them for **Cross Data Station** reporting in a Distributed Union.

Properly configured address books allow your Researcher, and Librarian Workstations to communicate with other Alexandria Data Stations (hosted or otherwise) in your district. Combined with the wide area network (WAN) or Z39.50 features of Alexandria, you can gain access to these interconnected library collections. If the only collection you require access to is the one stored on your main Data Station (or you don't have a WAN or a Central Union multi-site license), you won't need to set up any address books—Alexandria defaults will be appropriately configured.



Address Book Preferences

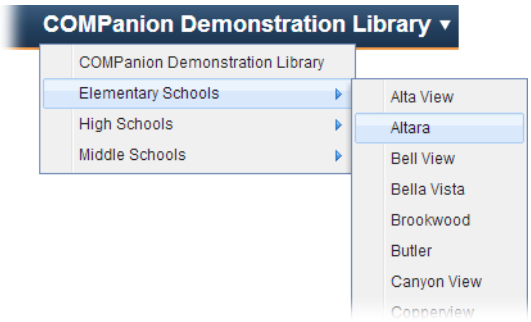
Every hosted (or otherwise) Data Station contains a default address book called the **Standard Address Book**. This *address book* contains your **Alexandria Data Station** address (i.e. *your* database)—all the items and assets inventoried in *your* collection. You *may not* edit or remove the **Standard Address Book** (or other *system* address books); however, aside from the **Alexandria Data Station** *address*, you *can* edit or remove all the other *addresses* contained within. You may add as many *address books* as you need to manage your Alexandria libraries and/or collections.

Generally, most operators create individual *addresses* for each of their supplementary sites in the **Standard Address Book**. However, additional *address books* may be created instead for more extensive searches. For example, you can create custom *address books* that contain sites by geographical regions (e.g. `Northwest Quadrant`) or levels (i.e. `Elementary Schools`) in a school district. Using the **Embedded Books** address type, these additional address books can be inserted into the **Standard Address Book** to create "sub-menus" and/or **Search Groups** (as shown with **Elementary Schools** in the example screenshot below).

If you are in a Central Union environment, as you add new sites from the **Site Management** window *(see page 41)*, new addresses—including associated **Site Names**—are automatically added to your **Standard Address Book**. These *addresses* can be removed and edited. In most cases, sites aren't something you should ever need to worry about adding to your **Address Books**; someone from your district's information technology (IT) department will usually set this up for your entire system.

Using the **Search Address Book** setting in your **Researcher Preferences** *(see page 149)*, you will be able to select the default address book that will be searched by all of the Researchers connected to your hosted Data Station.

On a Researcher, your "local collection" (i.e. the addresses contained in the **Standard Address Book**) will *always* be shown at the top of the **Library Search** menu, followed by "search groups", "sub-menus", and individual address entries (sorted alphabetically). If you don't want a particular *address* or embedded *address book* to appear in the **Library Search** menu, select **Hide on Researcher** or **Hide Everywhere** from the **Availability** drop-down menu (when you **Add** or **Edit** an *address type*); page 82.



Address Books Settings

The areas located at the bottom of the **Address Books** and **Addresses** sections contain several tools used for adding, editing, duplicating, and removing *address books* and *addresses*.

The area situated below the **Address Books** and **Addresses** list field contains several tools icons that are used for adding, duplicating, editing, removing, pinging, and moving address books and site addresses.

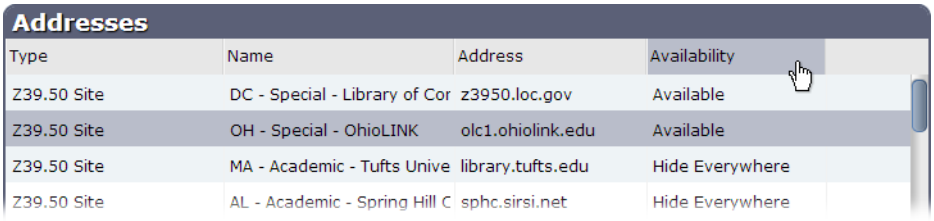
Address Books Tools

- **Add**—Clicking the **Add** ("**+**") button will perform the **Add Address Book** function.
- **Remove**—Clicking on the **Remove** ("**—**") button will perform the **Remove Address Book** function.
- **List**—This list icon contains some simple tools that change which address books appear in the **Address Books** records list. The **List** menu contains the following options:
- **Edit**—If selected, the **Edit Address Book** command will be performed.
- **Duplicate**—If selected, the **Duplicate Address Book** command will be performed.

Addresses Tools

- **Add**—Clicking the **Add** button will perform the **Add Address** function.
- **Remove**—Clicking on the **Remove** button will perform the **Remove Address** function.
- **Edit**—Clicking the **Edit** button will perform the **Edit Address** function.
- **Duplicate**—Clicking the **Duplicate** button will perform the **Duplicate Address** function.

You are also able to *sort* addresses in the **Addresses** section by clicking on the column headers: **Type**, **Name**, **Address**, and **Availability**. Of the four, **Availability** is the most useful—this way, you can quickly discover which addresses you are actively searching.



NOTE:
Sites that are behind a firewall will need to open ports `1025` and `30427` in order to make their collections accessible.

Address Books: Adding, Removing, Editing, and Duplicating

You may add as many different *address books* as you need to manage your library collections. Since you can specify which address book(s) your Researcher will use by default, additional address books can be used for more extensive searches. Click the **New** ("**+**") button at the bottom of the **Address Books** section to add a new *address book*. Your hosted Data Station's *local* library collection is represented as the top entry in the **Standard Address Book**.

Address books can even contain other address books; although you may embed an existing address book into another, you are *not* allowed to embed the **Address Book** you have selected into itself—doing so would create an endless, unproductive loop.

You can duplicate (i.e. *copy*) an existing **Alexandria Data Station**, **Textbook Tracker Data Station**, **Z39.50 Site**, **Embedded Book**, or **District Access** *address type* into one of your established *address books* contained within the **Address Books** section.

Address Books Management

You may choose to add an **Alexandria Data Station**, **Textbook Tracker Data Station**, **Z39.50 Site**, **Embedded Book**, or **District Access** address to a selected (i.e. highlighted) *address book*.

The fields and drop-down menus of the **Add Addresses** roll-down will vary depending on the **Address Type** you choose.

Detailed information about each of our supported *address types* and their related configuration settings can be found below:

- **Step-by-Step: Adding a New Address Book**; *see page 77*.
- **Step-by-Step: Removing an Address Book**; *see page 81*.
- **Step-by-Step: Editing the Name of an Address Book**; *see page 79*.
- **Step-by-Step: Duplicating an Address Book**; *see page 80*.

Step-by-Step: Adding a New Address Book

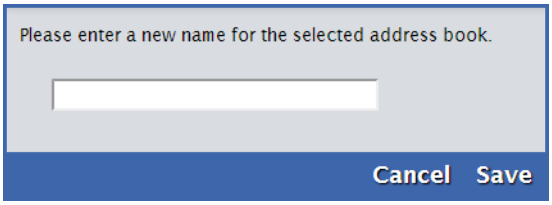
To create a new *address book*, do the following:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Book** icon in the **Configuration** section of the **Preferences** window.

Step 3. On the **Address Book** preference window, click the **Add Book** ("**+**") button located in the bottom left-hand corner of the **Address Book** section.

Step 4. An **Add Address Book** roll-down will appear.



Step 5. Enter a name for the new **Address Book** (required).

Step 6. Click **Save** when you are done, or **Cancel** to close the **Add Address Book** roll-down without adding a new *address book*.

Step 7. You may continue to add new *addresses books* as necessary.

Step 8. When you are finished, click **Save** at the top of the main **Address Book** preference window to keep your new *address books*; otherwise, click **Revert** to abandon them.

Step 9. Your new *address book* will appear alphabetically in the **Address Book** list.

Step 10. You may now begin adding *addresses* to your newly created **Address Book** by following the instructions on page 81.

Step-by-Step: Removing an Address Book

Please remember that you are only allowed to remove non-system *address books* and you will be *unable to remove* system address books (e.g. **Standard Address Book**, **District Address Book**, **Standard Z39.50 Address Book**).

To remove a non-system *address book* (and all associated *addresses*), do the following:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **Configuration** section of the **Preferences** window.

Step 3. In the **Address Books** section, select (i.e. highlight) the name of the *address book* that you want to remove.

Step 4. Next, click the **Remove Book** ("**—**") button located in the bottom left-hand corner of the **Address Books** section.

Step 5. A **Remove Book** confirmation roll-down will appear, asking if you're sure you want to remove the currently selected *address book* and all associated *addresses*.

Step 6. Click **Yes** if you are sure and **No** if you are uncertain.

Step 7. Once you have finished, press **Save** to keep the changes or click **Revert** to undo them.

Step 8. You may continue to remove *addresses books* as necessary.

Step 9. When you are finished, click **Save** at the top of the main **Address Books** preference window to retain your *address book* changes; otherwise, click **Revert** to abandon them.

Step-by-Step: Editing the Name of an Address Book

Please remember that you are only allowed to edit the names of non-system *address books* and you will be *unable to change* the name of *system* address books (e.g. **Standard Address Book**, **District Address Book**, **Standard Z39.50 Address Book**).

To rename an existing, non-system *address book*, do the following:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **Configuration** section of the **Preferences** window.

Step 3. In the **Address Books** section, select (i.e. highlight) the name of the (non-system) *address book* that you want to rename.

Step 4. Next, click on the **List Options** menu located in the bottom right-hand corner of the **Address Books** section and select **Edit**.

Step 5. An **Edit Address Book** roll-down will appear, asking you to provide a new name for the selected *address book*.

Step 6. Enter a new name for the selected **Address Book** (required).

Step 7. Click **Save** when you are done, or **Cancel** to close the **Edit Address Book** roll-down without changing the *address book* name.

Step 8. Your renamed *address book* will be sorted alphabetically in the **Address Books** list.

Step-by-Step: Duplicating an Address Book

To duplicate an existing *address book*, do the following:

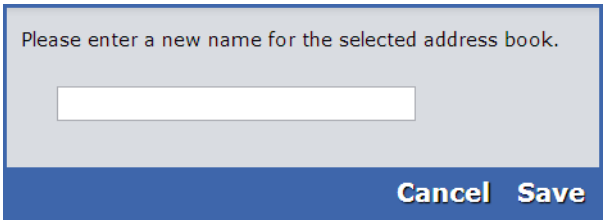
Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **Configuration** section of the **Preferences** window.

Step 3. In the **Address Books** section, select (i.e. highlight) the name of the (non-system) *address book* that you want to duplicate.

Step 4. Next, click on the **List Options** menu located in the bottom right-hand corner of the **Address Books** section and select **Duplicate**.

Step 5. A **Duplicate Address Book** roll-down will appear, asking you to provide a new name for the duplicated *address book*.



Step 6. Enter a *unique* name for the duplicate **Address Book** (required).

Step 7. Click **Save** when you are done or **Cancel** to close the **Duplicate Address Book** roll-down and discard the duplicate *address book*.

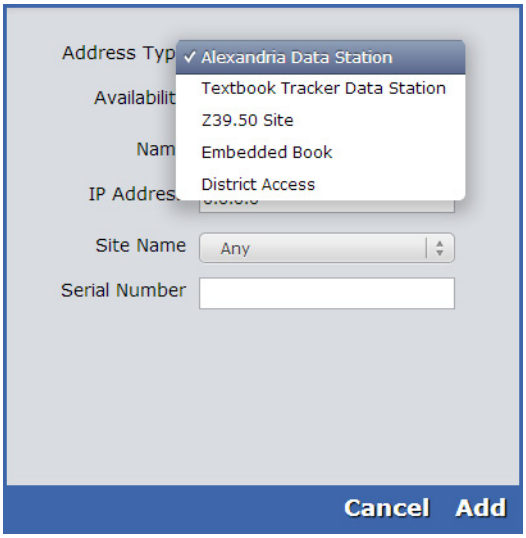
Step 8. Your newly duplicated *address book* will appear alphabetically in the **Address Books** list.

Addresses: Adding, Removing, Editing, and Duplicating

You may choose to add an **Alexandria Data Station**, **Textbook Tracker Data Station**, **Z39.50 Site**, **Embedded Book**, or **District Access** *address* to a selected (i.e. highlighted) address book.

The fields and drop-down menus of the **Add Addresses** roll-down will vary depending on the **Address Type** you choose.

Detailed information about each of our supported *address types* and their related configuration settings, please refer to corresponding sections in our Online Help documentation.



Address Management

Visit the following links to view step-by-step **Address** management information:

- **Step-by-Step: Adding Addresses to an Address Book**; *see page 84.*
- **Step-by-Step: Duplicating an Address**; *see page 85.*
- **Step-by-Step: Editing an Address**; *see page 86.*
- **Step-by-Step: Removing an Address from an Address Book**; *see page 87.*

Address Type Settings

Choose **Alexandria Data Station**, **Textbook Tracker Data Station**, **Z39.50 Site**, **Embedded Book** or **District Address** as the address you'd like to add from the **Address Type** drop-down menu. Some **Address Type**(s) may not be available if you're not registered for a particular feature or module (e.g. **District Access**). The text fields and drop-down menus of the **Add Site Address** window will vary depending on which **Address Type** is selected. Listed below you will find explanations of these **Address Type** settings and selections.

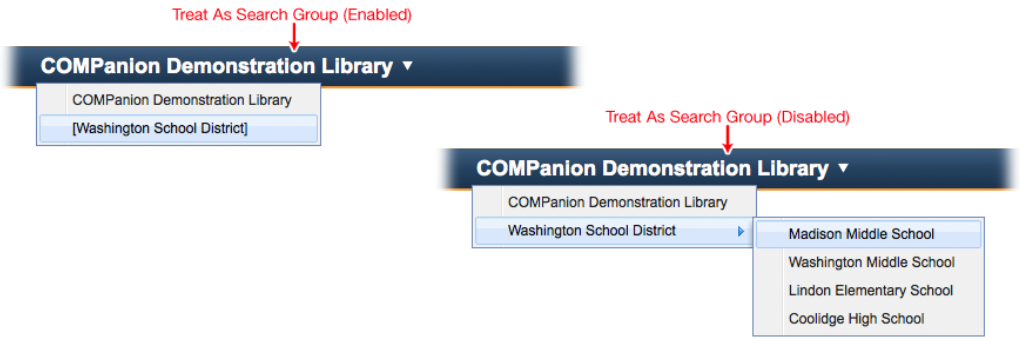
- **Availability—**Use this drop-down menu to determine whether this *address type* will be *available* to everyone, *hidden* only from connected Researchers, or completely *hidden everywhere* altogether—including **Cross Data Station** reporting.This selection is available for *all* address types
- **Name—**Use this field to name your new *address type* (e.g. `Washington Middle School`). This field is *required*; trying to save without a name will cause an error message to appear. This field is available for *all* address types.
- **IP Address—**Supply the IP address of the machine to which you are trying to connect. Leave this field blank (i.e. `0.0.0.0`) if you only want to search your local collection (i.e. your hosted Data Station).This field is available in all address types *except for* **Embedded Book**.

- **Site Name—**In a Central Union environment, the Data Station houses multiple collections under a single IP address. When adding new *addresses*, licensed Central Union users can use the **Site Name** field to target a single library collection within that hosted database.

  When you select an address with a specified **Site Name**, then only *that* collection will be analyzed (instead of **Any** available collection embedded within that Central Union database). For example, let's say that you have ten different library collections all stored on one hosted Central Union Data Station. If you would like to create individual *addresses* for each of these ten collections, you need some way to distinguish one from another. Because these collections all use the same IP address, you will need to provide each address that you create with a specific **Site Name**. This setting only applies to those in a Central Union and is currently only meaningful for **Cross Data Station** reporting. Additionally, the selections that appear in the Central Union's **Site Name** drop-down menu are populated by the local sites defined in your **Site Management** window—*not* from the addresses created in these **Address Books Preferences**. For a standard, single-site license, **Any** will be the only available option from this drop-down menu.

- **Serial Number—**If connecting to a Central Union, provide the serial number of the desired Alexandria Data Station else **Cross Data Station** reporting won't be available. This is only available for **Alexandria** and **Textbook Tracker Data Station** address types.

- **Database—**When specified, users will be routed to the Z39.50 database indicated in this field. In an Alexandria Controller environment, this field supports the entry of a hosted Data Station's serial number; this way, those who want to connect to a specific Data Station that is hosted on a **Controller** will be routed to the appropriate collection. This selection is only available for **Z39.50 Site**.
- **Port—**A valid port number (e.g. 210) is required by Alexandria in order to successfully search the indicated Z39.50 database. This selection is only available for **Z39.50 Site** address types.
- **Username and Password—**Connection to some Z39.50 servers require a username and password. If they are required and you know them, provide them in the allotted spaces. Please keep in mind the case sensitivity of usernames and passwords. These fields are only available for **Z39.50 Site** address types.
- **Search Order—**Alexandria will only ever perform *two* Z39.50 server searches at a time; these servers are searched in a known order determined by the **Search Order** selected from this drop-down menu. One advantage of using the **Search Order** drop-down is that you are able to determine which sites are returning results and which are not. In other words, if a particular **Search First** server isn't returning any results, you may choose to remove it, to **Hide Everywhere**, pick a different server, or change it's search order to **Search Last**. A good strategy is to *only* select site(s) that you think will return the most complete, accurate information. After all, you only need *one* complete record to match, not 100 of them—therefore, choosing 100 sites to **Search First** isn't necessarily better than picking 4.
- **Treat As Search Group—**If you have **Treat As Search Group** enabled, then all the *addresses* contained within an embedded *address book* are treated as a "group" and are searched as a whole; they appear in brackets ("`[ ]`") in the site selection drop-down menu of the Researcher's header bar (e.g. `[Washington School District]`). If you choose to disable **Treat As Search Group**, then all the *addresses* contained within an embedded *address book* are placed inside a "sub-menu" and can be individually selected apart from the group. This setting is only available in **Embedded Book** address types.



For more comprehensive information about these **Address Type** settings, please refer to corresponding sections in our Online Help documentation.

Step-by-Step: Adding Addresses to an Address Book

To generally configure most *address type* settings:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **Configuration** section of the **Preferences** window.

Step 3. On the **Address Books** tab, click on (select or highlight) an *address book* name from the **Address Books** section (located on the left-hand side of the **Address Books** window); preferably the one for which you'd like to add a new **Addresses** (i.e. *address types*). Your new *address type* will appear in the **Addresses** section of the **Address Books** preference window.

Step 4. Click the **Add** ("**+**") button located at the bottom of the **Addresses** section of the **Address Books** window; this will cause the **Add Addresses** roll-down to appear.

Step 5. Using the **Add Addresses** roll-down, use the **Address Type** drop-down menu to choose the *type* of *address* you'd like to add. Some **Address Type**(s) may not be available if you're not registered for a particular feature or module (e.g. **District Access**).

Step 6. The contents of the **Add Addresses** roll-down will vary depending on the **Address Type** you choose. Detailed information about each of our *address types* can be found in our Online Help documentation.

Step 7. Click **Add** when you are done, or **Cancel** to close the **Add Addresses** roll-down without adding a new *address*.

Step 8. You may continue to add *new addresses* to the selected *address book* as necessary.

Step 9. On the top of the main **Address Books** preference window, click **Save** to keep your changes or **Revert** to abandon them.

Step-by-Step: Duplicating an Address

If a specific *address type* has already been created for an existing **Address Book**, you can copy it into another *address book* by selecting (highlighting) it and using the **Duplicate** functionality.

To duplicate addresses or copy existing *addresses* to a different *address book*:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **Configuration** section of the **Preferences** window.

Step 3. On the **Address Books** tab, click on (select or highlight) an *address book* name from the **Address Books** section (located on the left-hand side of the **Address Books** window); preferably the one containing the *addresses* you'd like duplicated.

Step 4. Next, click on (select or highlight) the *address type* you want duplicated from the **Addresses** section.

Step 5. Click the **Duplicate** button located at the bottom of the **Addresses** section of the **Address Books** window; this will cause the **Duplicate Address** roll-down to appear.

Step 6. Using the **Duplicate Address** roll-down, provide a new name for your duplicate *address*.

Step 7. Next, select the existing *address book* where you want your duplicate *address* saved and click **OK**.

Step 8. The newly duplicated *address* will appear at the bottom of the **Addresses** section in the **Address Books** of your choosing.

Step 9. You may continue duplicating *addresses* into selected *address books* as necessary.

Step 10. On the top of the main **Address Books** preference window, click **Save** to keep your changes or **Revert** to abandon your duplicated *addresses*.

Step-by-Step: Editing an Address

To edit *address type* settings:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **Configuration** section of the **Preferences** window.

Step 3. On the **Address Books** window, click on (select or highlight) an *address book* name from the **Address Books** section (located on the left-hand side of the **Address Books** window); preferably the one containing the **Addresses** (i.e. *address types*) that you would like to edit.

Step 4. Next, click on (select or highlight) the *address type* you want to edit from the **Addresses** section.

Step 5. Click the **Edit** button located at the bottom of the **Addresses** section of the **Address Books** window; this will cause the **Edit Addresses** roll-down to appear.

Step 6. Make the changes you desire to any of the editable *address type* fields. Detailed information about each *address type* can be found in the following locations: **Alexandria Data Station**, **Textbook Tracker Data Station**, **Z39.50 Site**, **Embedded Book**, or **District Access**.

Step 7. Next, click **OK** to keep your changes or press **Cancel** to restore them to their previous settings.

Step 8. You may continue to edit *addresses* from the selected *address book* as necessary.

Step 9. When you are finished, at the top of the main **Address Books** preference window, click **Save** to keep or **Revert** to restore your changed *addresses*.

Step-by-Step: Removing an Address from an Address Book

To remove *addresses* from an *address book*:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **Configuration** section of the **Preferences** window.

Step 3. On the **Address Books** tab, click on (select or highlight) an *address book* name from the **Address Books** section (located on the left-hand side of the **Address Books** window); preferably the one containing the **Addresses** (i.e. *address types*) that you would like to remove.

Step 4. Next, click on (select or highlight) the *address type* you want removed from the **Addresses** section.

Step 5. Click the **Remove** button located at the bottom of the **Addresses** section of the **Address Books** window; this will delete the selected *address type*.

Step 6. You may continue to remove *addresses* from the selected *address book* as necessary.

Step 7. When you are finished, at the top of the main **Address Books** preference window, click **Save** to keep or **Revert** to restore your deleted *addresses*.

Notes:

Localization Preferences

Localizing Alexandria

The **Localization Preferences** allow those who use Alexandria outside of the United States to have complete customization over their language, date formats, and currency standards. You should only ever need to configure the **Dates & Currency** preferences if you are in a country outside of the United States; changes made to these preferences will take effect immediately.

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Localization** icon in the **Configuration** section of the **Preferences** window.

Step 3. Go ahead and familiarize yourself with the **Currency & Dates** tab; however, if your site resides in the United States, you shouldn't need to change a thing *(page 90)*.

Step 4. In the **Terminology** tab, adjust the settings in the **Patron** and **Item** sections accordingly *(page 92)*.

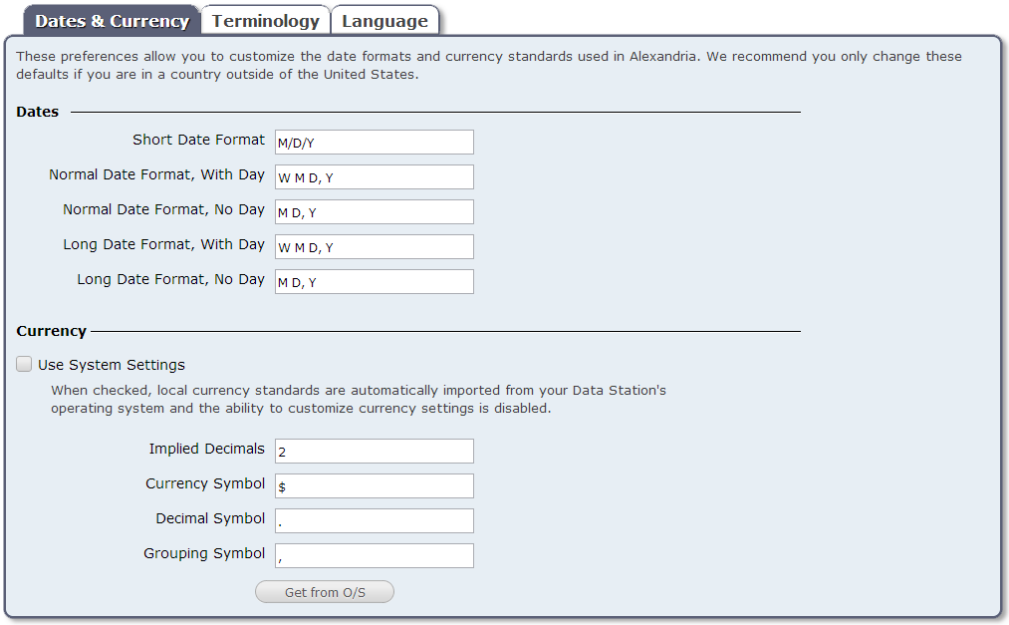
Step 5. Finally, in the **Language** tab, you may choose from one of our currently supported languages: **English**, **Français**, or **Español** *(page 94)*.

Step 6. Click on **Save** in the upper-right corner of the window.

Step 7. Click **Show All** to return to the main **Preferences** window.

Dates & Currency tab

In the United States of America, date formats are typically expressed in *month*, *day*, *year* order; however, aside from Belize[1], the vast majority of the world expresses dates in the ascending order of *day*, *month*, *year*. These two formats are largely incompatible and can cause massive date confusion. For example, in the United States, *03/07/16* generally means it is the *7th of March, 2016*—in the rest of the world, it means it is the *3rd of July, 2016*. Changing **Dates** settings will affect *all* circulation computations (e.g. reservations and holds) and nearly every date format displayed throughout Alexandria, including those found in **Reports**, **Policies** (e.g. hard due dates), notifications, etc.


Dates & Currency
Terminology
Language
These preferences allow you to customize the date formats and currency standards used in Alexandria. We recommend you only change these defaults if you are in a country outside of the United States.
Dates
Short Date Format
M/D/Y
Normal Date Format, With Day
W M D, Y
Normal Date Format, No Day
M D, Y
Long Date Format, With Day
W M D, Y
Long Date Format, No Day
M D, Y
Currency
Use System Settings
When checked, local currency standards are automatically imported from your Data Station's operating system and the ability to customize currency settings is disabled.
Implied Decimals
2
Currency Symbol
$
Decimal Symbol
.
Grouping Symbol
,
Get from O/S

Dates Settings

- **Short Date Format—**If you want month to come first, the short date format is typically configured as '`M/D/Y`', providing output like *12/11/2016*. If you'd like the day to come first, use '`D/M/Y`', as in *11/12/2016*. Keep in mind that some date-based commands entered into the command line are accepted only if their date format agrees with *this* setting (for example, **override dates**); this is because Alexandria depends on your date settings to determine if *03/07/16* means the *7th of March* or the *3rd of July*. Also, be aware that the date separator (e.g. " / ", " , ", " - ") required to parse the circulation command properly is the one that you configure here. Default date format/separator combination is `M/D/Y`.

1.http://en.wikipedia.org/wiki/Date_format_by_country

- **Normal Date Format, With Day—**If you want *month* to come first, the normal date format (with an abbreviated preceding day) is typically configured as '`W M D, Y`', providing output like *Wed. Dec 11, 2016*. If you'd like *day* to come before month, use '`W D M, Y`', as in *Wed. 11 Dec, 2016*. Default is `W M D, Y`.
- **Normal Date Format, No Day—**If you want *month* to come first, the normal date format is typically configured as '`M D, Y`', providing output like *Dec 11, 2016*. If you'd like *day* to come before month, use '`D M, Y`', as in *11 Dec, 2016*. Default is `M D, Y`.
- **Long Date Format, With Day—**If you want *month* to come first, the long date format (with an unabridged preceding day) is typically configured as '`W M D, Y`', providing output like *Wednesday Dec 11, 2016*. If you'd like *day* to come before month, use '`W D M, Y`', as in *Wednesday 11 Dec, 2016*. Default is `W M D, Y`.
- **Long Date Format, No Day—**If you want *month* to come first, the long date format is typically configured as '`M D, Y`', providing output like *Dec 11, 2016*. If you'd like *day* to come before month, use '`D M, Y`', as in *11 Dec, 2016*. Default is `M D, Y`.

Currency Settings

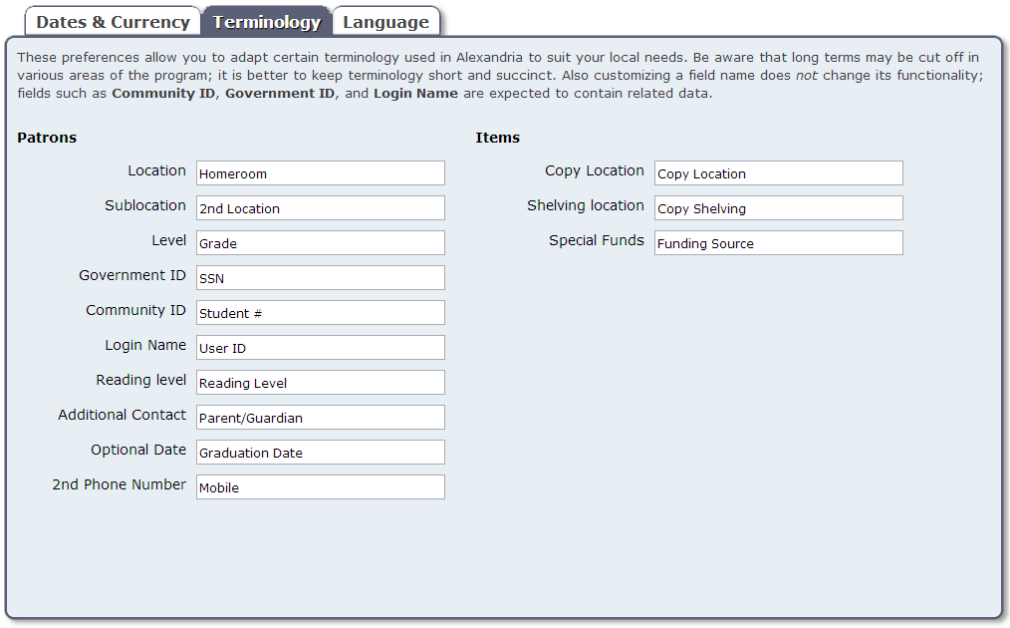
- **Use System Settings—**If checked, local currency standards are automatically imported (and implemented) from the hosted Data Station's operating system. These adopted standards will appear in the subsequent **Currency** fields, but are uneditable. However, if the **Use System Settings** checkmark is removed, you may edit the currency settings manually. Keep in mind that this will *only* change your Alexandria currency standards, it will *not* affect your operating system settings.
- **Implied Decimals—**This value, which *must* be between `0` and `4`, determines how many *implied* decimals (numbers after the decimal point) are used for your local currency standards. For example, `2` is the correct value for United States currency.
- **Currency Symbol—**Currently, only a single-character currency symbol is supported (e.g. as in "`$`" for United States currency; others examples would be "¤", "¢", "€", and "£").
- **Decimal Symbol—**Specify the symbol used as the decimal point (e.g. as in "`.`" for United States currency).
- **Grouping Symbol—**Specify the symbol used as the grouping separator (e.g. as in "`,`" for thousands in United States currency). Currently, only 3-digit groupings are supported.
- **Get from O/S—**Pressing this button will automatically import localized currency settings from your hosted Data Station's operating system.

Terminology tab

These preferences are used to customize terminology for some of the patron- and item-related fields within Alexandria, including those commonly found in the **Patron** and **Item Management** windows. Long terms may be cut off in various areas of the program; therefore, it is always best to keep terminology *short* and *succinct*. Changes made to these preferences will take effect immediately.

If numeric ranges are going to be used with *any* of these fields, they need to be padded with zeros in order to be sorted and selected correctly. For example, instead of a "1", "2", "402", you'd insert "001", "027", "402". Basically, in order to sort properly, *all entries with a numeric range need to have the same number of characters*.

Keep in mind that customizing a field name does *not* change its core functionality; fields such as **Community ID**, **Government ID**, and **Login Name** are still expected to contain equivalent data.



Patrons Settings

- **Location—**This preference allows you customize the term used for the **Location** field. For school libraries, this defaults to **Homeroom**; for other sites, this term defaults to **Location**. Although you may change this terminology, our documentation generally refers to it as **Location**.
- **Sublocation—**This preference allows you customize the term used for the **Sublocation** field. Use this field for whatever extra information you may need to enter. For example, you may want to use the term "*Last Period*" to identify an alternate location below the primary **Location** field. Although you may change the term, our documentation generally refers to it as **2nd Location**.

- **Level—**This preference allows you customize the term used for the **Level** field. For school libraries, this defaults to **Grade**; for other sites, this term defaults to **Level**. Although you may change the term, our documentation generally refers to it as **Grade**.
- **Government ID—**This preference allows you customize the term used for national identification numbers; in the United States, this is typically the Social Security Number. Although you may change the term, our documentation generally refers to it as **SSN**.
- **Community ID—**This preference allows you customize the term used for community or local identifiers. For school libraries, this defaults to **Student #**; for other sites, this term defaults to **ID #**. Although you may change the term, our documentation generally refers to it as **Student #**.
- **Reading Level—**This preference allows you customize the term used for the *leveled reading system(s)* utilized at your school (e.g. **Fountas and Pinnell** or **Accelerated Reader**). Although you may change the term, our documentation generally refers to it as **Reading Level**. If your school, site, or institution doesn't use the reading level terminology, this field can be used for other info such as AUP (acceptable usage policy) status.
- **Additional Contact—**This preference allows you customize the term used for *emergency* or *secondary contacts*. Although you may change the term, our documentation generally refers to it as **Parent/Guardian**.
- **Optional Date Field—**This preference allows you customize the term used for the (optional) date field in a patron record. Although you may change the term, our documentation generally refers to it as **Graduation Date**.
- **2nd Phone Number—**This preference allows you customize the term used for the *secondary phone number* field. Although you may change the term, our documentation generally refers to it as **Mobile**.

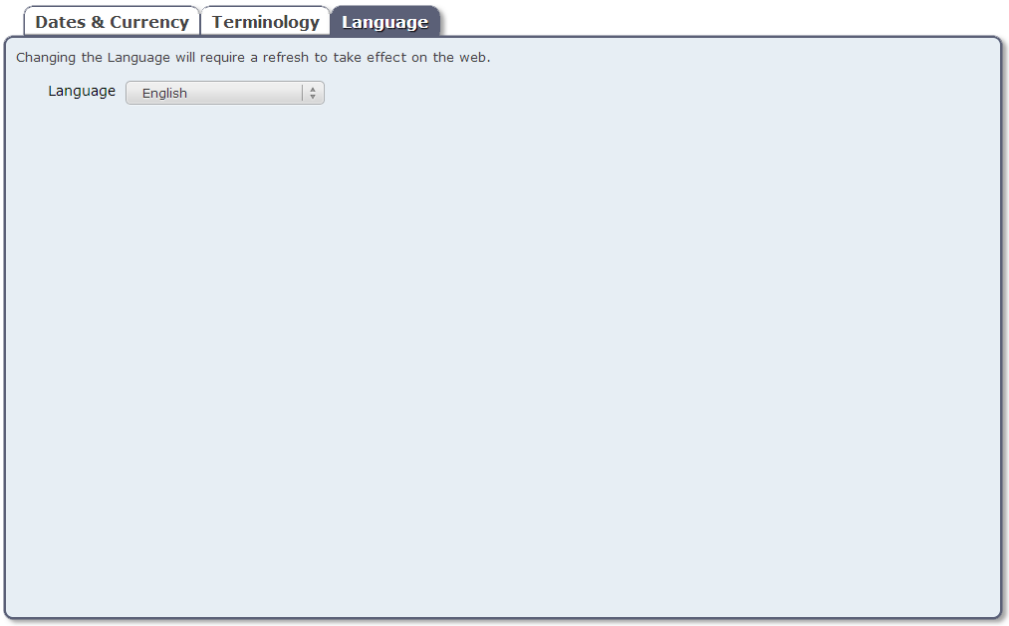
Items Settings

- **Copy Location—**This preference allows you customize the term used for the **Copy Location** field stored in the **852_a** tag. For example, you may want to use the term "`Collection`" or "`Library Floor`" (for a multi-leveled library) rather than "`Copy Location`". Although you may change this terminology, our documentation will generally refer to it as **Copy Location**.
- **Shelving Location—**This preference allows you customize the term used for *shelving location*, an alternative location field stored in the **852_c** tag. Although you may change this terminology, our documentation will generally refer to it as **Copy Shelving**.
- **Special Funds—**This preference allows you customize the term used for *government grants* or *special funding* stored in the **852_1** repeating tag. Although you may change this terminology, our documentation will generally refer to it as **Funding Source**.

Language tab

These settings reconfigure Alexandria to operate in your native language; the language selected here will apply to *all* Alexandria systems and modules[1]. You may choose from one of our currently supported languages: **English**, **Français**, or **Español**. Changing the default language requires a browser refresh to take effect on the web.

Currently, Alexandria doesn't catalog or display languages with alphabets containing non-Roman characters (e.g. Arabic, Chinese, Japanese, Korean, Russian, etc.). However, non-Roman languages that have been *"translated"* to Roman (Latin) *can* be saved; for example, an Arabic language book could be translated to *"One Thousand and One Nights"* and then successfully cataloged in Alexandria.



Language Settings

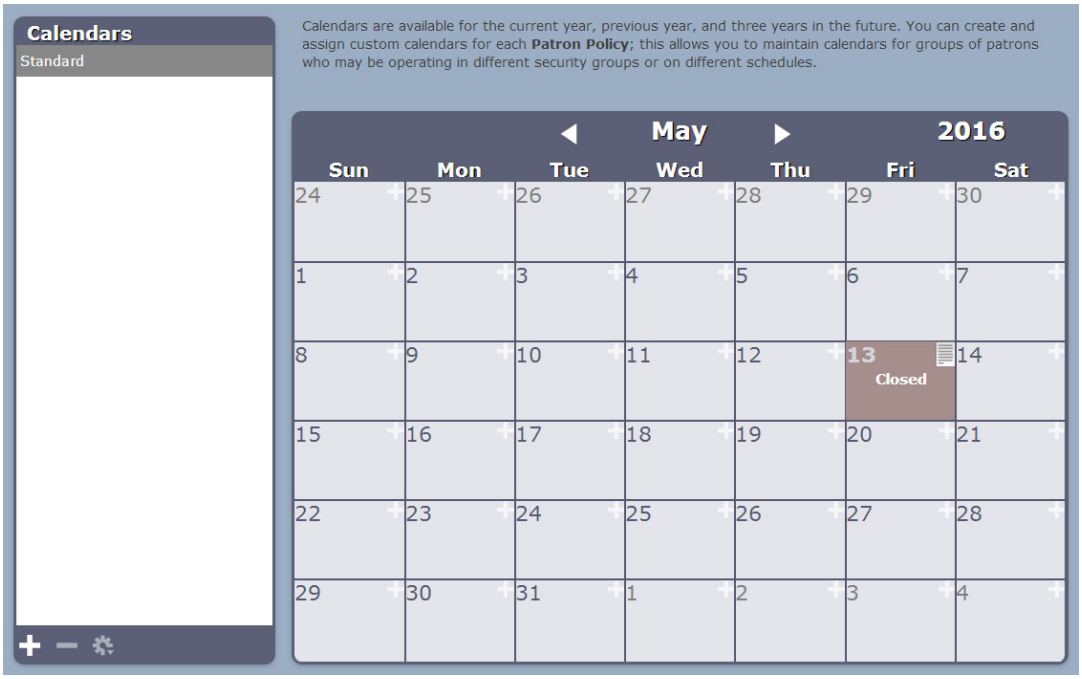
- **English—**This selection will make English the default language for Alexandria.
- **Français—**Cette sélection sera Français la langue par défaut pour Alexandria.
- **Español—**Esta selección hará Español el idioma predeterminado de Alexandria.

1.The default language preference is initially set by your Alexandria registration information.

Calendar Preferences

Contingent upon your **Policies**, **Calendars** are used to help accurately perform certain circulation-based calculations, such as assign due dates, calculate fines, and manage holds, among other things. Therefore, it's essential that you establish your week-to-week schedule and identify specific **Closed** dates throughout the year. To assist you in setting up your calendar(s) quickly and accurately, we recommend that you obtain a copy of your district's yearly schedule, highlighting *all* of the **Closed** dates and holidays for the current—and upcoming—year(s).

These preferences also make it possible to create and assign custom calendars for each of your **Policies**; helpful for when you have groups of patrons who may be operating on different school levels and/or schedules. For the time being, you are only allowed to create calendars for the entire district—*not* for a specific school.


Calendars
Standard
Calendars are available for the current year, previous year, and three years in the future. You can create and assign custom calendars for each **Patron Policy**; this allows you to maintain calendars for groups of patrons who may be operating in different security groups or on different schedules.
May
2016
Sun Mon Tue Wed Thu Fri Sat
24 25 26 27 28 29 30
1 2 3 4 5 6 7
8 9 10 11 12 13 14
Closed
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31 1 2 3 4

Step-by-Step: Creating Calendars

Alexandria provides calendars for the current year, the previous year, and three years in the future.

Step 1. Select **Edit** from the main menu followed by **Preferences** (Cmnd/Ctrl+;).

Step 2. Click on the **Calendars** icon in the **Management** section of the **Preferences** window.

Step 3. To change the **Month**/**Year** of the current calendar, click on the current month/year name at the top of the calendar field; alternately, you may click the **Next** arrow to go forward one month or the **Previous** arrow to go back a prior month.

Step 4. Select an existing calendar from the **Calendars** list on the left-hand side of the window.

Step 5. You can assign **Period Due** and **Closed** dates by clicking days on the actual calendar.

Clicking on calendar days cycles your choices from **Open** (nothing displayed), **Closed** (dates on which the library is closed), **Period Due** (see below), and then back to **Open**.

Work through each month of the year, marking the dates on which the library is **Closed** (e.g. holidays). Depending on your **Policies** settings, item due dates are usually calculated so that they never fall on **Closed** dates—only on **Open** or **Period Due** dates. However, there are some exceptions to **Closed** dates when using **Override Dates**; for instance, you can configure your **Policies** so that fines stop accruing on closed days.

To change the **Closed** date for the *same day of the week for the entire selected month*, click on one of the **Sun** through **Sat** buttons at the top of the calendar.

Step 6. Mark the date(s) that you want *all* materials to be returned to your library as **Period Due** (e.g. a particular date near the end of the school year). A **Period Due** date forces an item (on a particular calendar) to be due on *that* day; configure your **Policies** to **Apply Period Due Dates**. For example, if you set a period due date of May 13, 2016, all books checked out *before* May 13th—that normally would have been due *after* the 13th—will be assigned a new due date of May 13th.

Step 7. Click on the white **Add Note** ("**+**") icon in a calendar date to add **General Date Notes** (available for all calendars). Notes can be used to display automatic reminders for both Researcher and Librarian Workstations, as well as provide private notes for the librarian. When you've created a note, an icon will appear on the calendar day.

Step-by-Step: Adding A New Calendar

To create a new calendar:

Step 1. In the **Calendars** section on the left-hand side, click the **New** ("**+**") button.

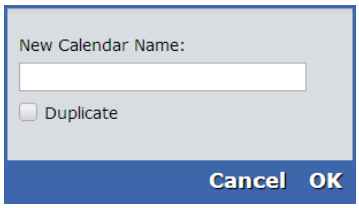
Step 2. The **New Calendar** roll-down will appear.

Step 3. Provide the **New Calendar Name** in the blank field.

Step 4. If the new calendar is to be a duplicate of the current calendar (i.e. used as a template for a new one), check the **Duplicate** box.

Step 5. Click **OK** to continue and make the new calendar current; alternately, click **Cancel**.

Step 6. Finally, click **Save** to keep your changes or **Revert** to abandon them.



Step-by-Step: Removing a Calendar

To remove an existing calendar:

Step 1. Select (highlight) the calendar to be removed from the **Calendars** list on the left-hand side of the window.

Step 2. Click the **Remove** ("**—**") button.

Step 3. An alert will appear, asking you to confirm the calendar's removal. Click **Yes** to permanently remove or **No** to cancel the removal.

Step 4. Any policies that were using the deleted calendar will be reassigned to the **Standard** calendar. You *cannot* delete the **Standard** calendar.

Step 5. Click **Save** to keep your changes or **Revert** to decline them.

Step-by-Step: Renaming a Calendar

To rename an existing calendar:

Step 1. Select (highlight) the calendar to be renamed from the **Calendars** list on the left-hand side of the window.

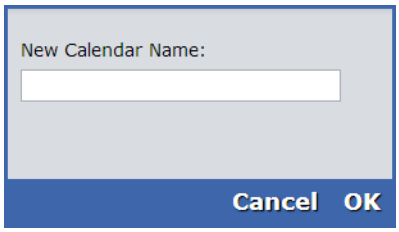
Step 2. Select **Rename** from the **Actions** drop-down menu.

Step 3. In the **New Calendar Name** roll-down, provide the new name for the calendar.

Step 4. Click **OK** to continue or **Cancel** to abort.

Step 5. Finally, click **Save** to keep your changes or **Revert** to decline them.

Step 6. Enter the **New Calendar Name** in the **Rename Calendar** roll-down.



Step-by-Step: Adding General Notes to a Calendar

Notes can be used to display automatic reminders for both Researchers, Web Librarians, and Librarian Workstations, as well as provide private notes for the librarian. To add notes to a calendar day:

Step 1. Click on the white **Add Note** icon ("**+**") in the desired date of the desired calendar (e.g. *May 13th* of the **Standard** calendar).

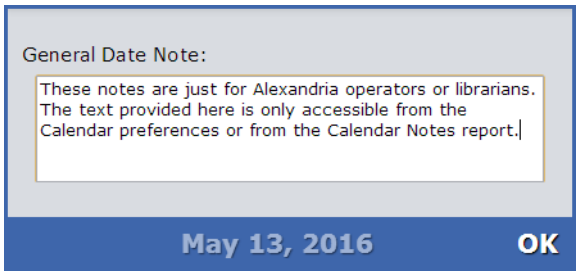
Step 2. The **General Date Note** roll-down for that date will appear; **General Date Notes** are available for *all* calendars.

Step 3. Enter the appropriate notes in the appropriate field.

Step 4. When you've created a note, an icon will appear on the calendar day.

Step 5. Click on **OK** to continue or **Cancel** to abort.

Step 6. Finally, click **Save** to keep your changes or **Revert** to discard them.


General Date Note:
These notes are just for Alexandria operators or librarians.
The text provided here is only accessible from the
Calendar preferences or from the Calendar Notes report.
May 13, 2016
OK

Policy Preferences

Use the **Policies Preferences** to establish rules that regulate how library resources are used by your patrons; this includes how items circulate, how long items may be checked out, how much overdue fines cost, whether an item can leave the building, how circulation periods are computed, and so forth. **Policies** are important for the purposes of circulation, reports, and statistics.

For example, you can set policies that allow tenth graders to check items out for longer periods of time than second graders; the borrowing period for reference items can be set for one day, while fiction and non-fiction works can be set for two weeks.

Alexandria collects statistics on each group of patrons, such as the types of items they borrow and when they are returned. These statistics are generally used to determine usage patterns for the library so that management can schedule staff accordingly and make educated administrative decisions.

Each group of patrons and items (for which usage statistics are collected) can be assigned a separate policy. For example, if each student grade level has its own policy, the statistics generated are more useful and accurate than if you have only one policy for *all* students.

This section will briefly describe how to set up, create, and remove policies; for more detailed information, please review the *"Policies"* section of Alexandria's Online Help.

- CENTRAL UNION -

Central Union libraries need to understand that **Policies** are *global*, so that means that everyone needs to agree when making changes, especially for **Item** policies since **Policy Mapping** might become useless if you do not keep things standard and simple. For instance, if you have a fiction policy that is different for each school, **Policy Mapping** will not know which fiction policy to use for items that have call numbers beginning with *FIC!* This could lead to a great deal of extra work every time you import items.

Why Do We Need Policies?

Although you may feel that your needs will be satisfied by the barest, basic statistical data such as number of items checked out for the week, month, or year—you may not realize the powerful statistics that Alexandria can provide. We would like you to consider a few thought-provoking questions:

- What role do statistics play in your library or district?
- Will you be referring to the statistical data that Alexandria gathers for you?
- Would more detailed statistics be beneficial to you and how?
- Is there a way to achieve *very* detailed statistical data?

Statistical Reports

Alexandria has many statistical report options available. The **Super Summary** report details an amazing amount of statistical data about your collection — number of titles and copies, value, number of lost and discarded copies, collection age, and collection usage (by call number, item policy, and medium). Other reports will show the number of items checked out, renewed, checked in and the number of holds placed in a certain time period. All these are extremely useful statistics; however, there is an additional feature of Alexandria that provides statistics based on combinations of patron and item policies.

Using grouped patron and item policies can generate statistical data that will empower you to view your collection with new eyes. For instance, circulating *3,615* items for the month may sound very impressive, but if you were able to compare the usage of one grade to another grade, you might be surprised by the results. Further, looking at the usage of one patron group compared to another in a particular area of your library collection could also be very informative.

For instance, if you were to use a combination of patron and item policies to see how many biographies were being checked out by eighth graders (since a biography unit is part of their core curriculum) and you discover, just before the end of the school year, that absolutely *no* eighth graders had checked out biographies—what could you do? You can take a very close look at your biographies to determine if the reading level is too low, too high, or is *so* outdated that the students do not recognize the names of the people whose biographies you have.

Setting Policies to Achieve Meaningful Statistics

Alexandria comes with two standard patron policies—**Standard Patron** and **System Patron**—and four standard item policies—**Standard Item**, **System Item**, **eBook**, and **Web Page**.

System Patrons/Items are used by Alexandria to set **Lost** and **Discarded** copies, etc.

Most operators will establish their own policies. Generally, these are kept very simple such as **Student** and **Teacher** or **Book** and **Reference**. Let's look at how we can make these policies provide more meaningful statistics.

To achieve greater detail in your statistics, we suggest a policy (or **Stat Group**[1]) for each specific group of patrons or items that you wish to follow. In a school setting, this might be a policy for each grade or even each grade/gender (e.g. **6th Grade Girls**); however, a public library might want to follow users from a geographical area and/or age (e.g. **Norton Township** or **Norton Township Adults/Children**). Even if the circulation privileges of the group are the same as other groups, you should still create policies that are going to identify the patron groups you wish to follow. With more detail-specific policies, you can now see how many items are being checked out by each of these patron groups. Let's take this idea a bit further by providing more detail in your item policies.

Perhaps you've set your item policies for general groups based upon the length of the checkout period: books for two weeks, reference with no circulation, audio-visual for one week, etc.

Let's break this down a bit more. True, you could have a **Fiction** and a **Non-Fiction** policy instead, but consider being even *more* detailed in setting your policies; instead of just **Non-Fiction**, think of the benefits of having a **000s** policy, a **100s** policy, a **200s** policy, etc.

Now, your statistics become *very* useful.

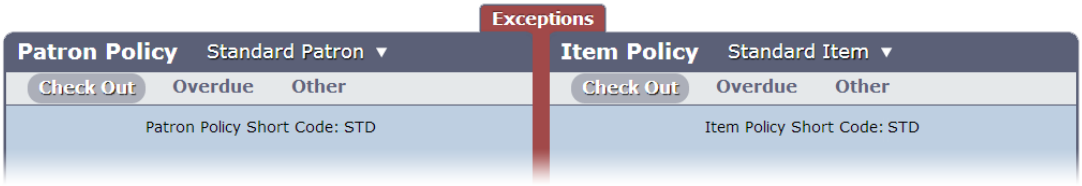
So, what exactly is a **Standard Item** and who is a **Standard Patron**? All of a sudden, these designations seem much less useful when compared to the other statistics mentioned above. Just think about how much more valuable these statistics could be if **Non-Fiction** was divided by the major divisions of the Dewey Decimal system.

1.A **Stat Group** is a way to group policies for statistical reporting.

Using the Policies Preferences

The **Policies** window is divided into two distinct sections that function independently of one another and allow you to create and customize the settings of a particular **Patron** or **Item** policy.

An operator can move through any of the subtabs located at the top of the window (**Check Out**, **Overdue**, and **Other**) at any time, no matter the current mode (i.e. **Standard** or **Exceptions**).



Standard Mode

Every patron *must* belong to a **Patron** policy; the rules of a particular **Patron** policy apply to *every* patron under that policy. An **Item** policy will be applied to every item in your collection; the rules of a particular **Item** policy apply to *every* item under that policy.

The settings of a particular **Patron** policy correspond to and interact with *every* **Item** policy. For example, selecting **3rd Grade** as your **Patron** policy and changing the **Maximum Loaned Items** to 6 will limit *every* patron in the third grade to six items of *any* **Item** policy, whether it be **Fiction** or **Non-Fiction**.

Exceptions Mode

The standard settings configured in the subtabs of the **Patron Policy** and **Item Policy** sections are considered the *general* rules for the selected patron and item groups (e.g. **6th Grade** and **eBook**). Exceptions to the way these combined policy groups interact in **Standard Mode** can be adjusted by clicking the **Exceptions** tab. Clicking the **Exceptions** tab will turn it red, indicating that you are in **Exceptions Mode**. This mode allows you to modify the behavior and relationships between selected patron and item policies and, hence, further customize your policy settings. For example:

- You can make an exception that items belonging to the **Reference** policy only circulate to members belonging to the **Staff** patron policy. While the standard **Transaction Period** for the **Reference** item policy could be set to "0" **Days**, an *exception* to the policy could be made so that the patron **Staff** policy may check out the reference books for "3" **Days**.
- While you usually allow your **4th Grade** patrons to check out five items at a time, you may want to limit them to three music CDs; select the **4th Grade Patron Policy** on the left and the **Music CDs Item Policy** on the right, click the **Exceptions** tab (it will turn red), and then change the **Maximum Loaned Items** checked out to the number "3".
- If you have a patron policy for **IT** (Information Technology) and an item policy for **Projectors**, you may want to give your information technology specialists the ability to check out projectors, but *only* them and no other patrons under any other policies.

Exceptions can be made to *every* policy combination via the fields, drop-down menus, and checkboxes contained in the **Check Out**, **Overdue**, and **Other Policy** subtabs. One rule of thumb when creating an exception is to set up the policy how it would apply to the majority of users and *then* set up the exceptions. When you **Save** your changes, the fields, drop-down menus, or checkboxes with exceptions will be highlighted in red, indicating that they are exceptions to the default standards.

Once you've finished, click the **Exceptions** tab again to deactivate **Exceptions Mode**. Any **Policies** subtab that contains an exception will display an **Alert** icon (i.e. warning sign) to the left of the subtab name; this indicates that an exception is present for the selected **Patron**/**Item** policy combination. If you were to switch to a policy that has no exceptions, there would be no **Alert** icons.

To remove exceptions, click on the **Exceptions** tab followed by either **Actions** drop-down menu located at the bottom of the **Patron** policy section (on the left) or the **Item** policy section (on the right). To remove an individual **Exception**, select (highlight) the field, drop-down menu, or checkbox that contains the exception and select **Remove Patron**/**Item Exceptions** from the relevant **Actions** menu. You may also select **Remove All Exceptions** from either **Actions** menu to remove *all* of the exceptions from the combined patron and item policy.

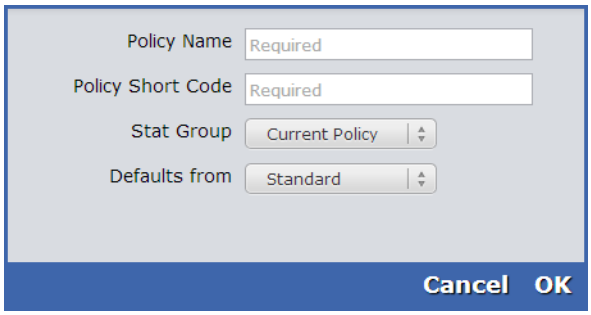
Step-by-Step: Creating New Patron Policies

Now that you're convinced more detailed **Patron** policies are the way to go, here are some steps to follow:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click the **Policies** icon in the **Management** section of the **Preferences** window.

Step 3. Click on **Add** in the lower-left hand side of the **Patron** policy section.



Step 4. Enter the new patron **Policy Name** and **Policy Short Code** and select an optional **Stat Group**[1] in the fields provided.

Step 5. Make a selection from the **Defaults from** drop-down menu; the new policy will take its default settings from the existing policy selected here.

Step 6. When you are finished, press `<enter>` or click **OK**

Step 7. Next, move through the various **Policies** subtabs (**Check Out**, **Overdue**, and **Other**) providing appropriate values to the fields, drop-down menus, and checkboxes in order to create your new policy.

Step 8. When you've completed your new policy, click the **Save** button.

Step 9. Repeat this process until you've created all the new patron policies you desire.

1.A **Stat Group** is a way to group policies for statistical reporting.

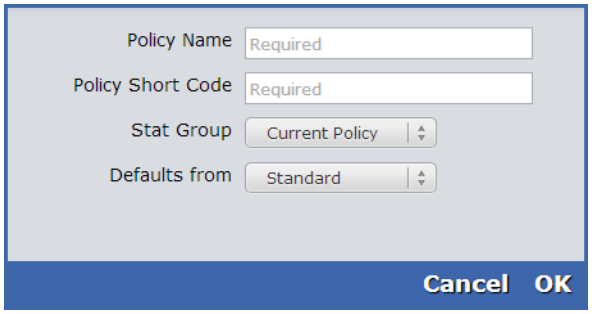
Step-by-Step: Creating New Item Policies

Now, following these steps, create your own **Item** policies:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Policies** icon in the **Management** section of the **Preferences** window.

Step 3. Click on **Add** in the lower-left hand side of the **Item** policy section.



Step 4. Enter the new item **Policy Name** and **Policy Short Code** and optional **Stat Group**[1] in the fields provided.

Step 5. Make a selection from the **Defaults from** drop-down menu; the new policy will take its default settings from the existing policy selected here.

Step 6. When you are finished, press <enter> or click **OK**.

Step 7. Next, move through the various **Policies** subtabs (**Check Out**, **Overdue**, and **Other**) providing appropriate values to the fields, drop-down menus, and checkboxes in order to create your new policy.

Step 8. When you've completed your new policy, click the **Save** button.

Step 9. Repeat this process until you have created all the new item policies you desire.

- NOTE -

Many school libraries or public libraries create policies based on medium type or call number range. Alexandria will *never* automatically change or set an item policy when it discovers a matching medium type or call number range. The librarian must set an item's policy either during an item import, running the **Utilities — Copies — Replace Information**, or manually in the **Item Management** window.

1.A **Stat Group** is a way to group policies for statistical reporting.

Step-by-Step: Creating an Exception

To create or modify a circulation policy:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Policies** icon in the **Management** section of the **Preferences** window.

Step 3. From the drop-down menu, select the **Patron Policy** that, when combined with an **Item Policy**, will create an exception.

Step 4. Next, from the drop-down menu, select the **Item Policy** that, when combined with your selected **Patron Policy**, will create an exception.

Step 5. Click the **Exceptions** tab (it should turn red).

Step 6. Work through the various **Policies** subtabs (**Check Out**, **Overdue**, and **Other**), changing the values of the text fields, drop-down menus, and checkboxes as needed.

Step 7. When you have successfully created your exceptions, click the **Save** button.

- NOTE-

Changing a policy will *not* affect past transactions. The only two ways to change the fine rate on a book that is currently checked out is to check in the book, forgive the fine, and check out the book to the same patron for the old due date (using a manual override date) or to use the **Utilities — Circulation — Update** utility.

Step-by-Step: Modifying a Patron or Item Policy

To modify a patron or item policy:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Policies** icon in the **Management** section of the **Preferences** window.

Step 3. Next, select the policy to be modified from the **Patron/Item Policy** drop-down menus.

Step 4. Move through the various **Policies** subtabs (**Check Out**, **Overdue**, and **Other**) providing appropriate values to the fields, drop-down menus, and checkboxes in order to modify your existing policy.

Step 5. When you have finished modifying the **Patron/Item Policy**, click **Save** to keep your changes; otherwise, click **Revert** to discard them.

- NOTE-

Modifying a **Patron/Item Policy** will *not* affect past transactions. The only way to change the fine rate on a book that is currently checked out is to check the book in, forgive the fine, and then check the book back out to the same patron with the original due date (using a manual override date).

Step-by-Step: Duplicating a Patron or Item Policy

You can duplicate a patron or item policy when the policy settings are either *exactly* the same as or there are only minor variations from an existing policy.

To duplicate a patron or item policy:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Policies** icon in the **Management** section of the **Preferences** window.

Step 3. Next, select the policy to be duplicated from the **Patron**/**Item Policy** drop-down menus.

Step 4. Click on **Duplicate** in the bottom toolbar of the **Patron** or **Item** policy section.

Step 5. Enter the new item **Policy Name** and **Policy Short Code** and optional **Stat Group**[1] in the fields provided.

Step 6. Make a selection from the **Defaults from** drop-down menu; the new policy will take its default settings from the existing policy selected here.

Step 7. When you are finished, press <enter> or click **OK**.

Step 8. Next, move through the various **Policies** subtabs (**Check Out**, **Overdue**, and **Other**) providing appropriate values to the fields, drop-down menus, and checkboxes in order to create your new policy.

Step 9. When you've finished modifying your duplicated item policy, click **Save**; otherwise, click **Revert** to discard them.

Step 10. Repeat this process until you have created all the new item policies you desire.

1.A **Stat Group** is a way to group policies for statistical reporting.

Step-by-Step: Removing a Patron or Item Policy

To remove a patron or item policy:

Step 1. First, make sure that *all* of the patrons or items that fall under the policy you are about to remove have been switched to the **Standard** policy. You will be unable to remove a policy it is still in use.

Step 2. Next, select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 3. Click on the **Policies** icon in the **Management** section of the **Preferences** window.

Step 4. Select the policy that you would like to remove from the **Patron** or **Item Policy** drop-down menus.

Step 5. Click the **Remove** button in the bottom toolbar of the **Patron** or **Item Policy** section.

Step 6. Click **OK** when you are asked if you're sure you'd like to remove the policy.

Step 7. Finally, click **Save**.

- NOTE -
The **Standard** and **System** policies can *not* be removed. They are required by Alexandria in order to function at all times.

Step-by-Step: Assigning an Item Policy to a Title

To assign an item policy to a title:

Step 1. Choose **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. The **Item Management** window will appear.

Step 3. Use the **Item Selection** window (Cmnd/Ctrl+F) to locate the title whose policy you want to change.

Step 4. The title you select will become current in the **Item Management** window.

Step 5. Use the item **Policy** drop-down menu (near the top of the window, located directly below the **Call Number** field) to select the new default policy for this title.

Step 6. Click **Save** at the top-right of the window.

Step-by-Step: Assigning an Item Policy to an Individual Copy

To assign an item policy to an individual copy:

Step 1. Choose **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. The **Item Management** window will appear.

Step 3. Use the **Item Selection** window (Cmnd/Ctrl+F) to locate the title with copies whose policy you want to change.

Step 4. The title you select will become current in the **Item Management** window.

Step 5. Next, click on the **Copy Information** tab; then click on the **Copy Info** subtab.

Step 6. Using the left and right arrows (located just below the subtab bar) to find the individual copy whose policy you want to change. If needed, use the copy information (e.g. **Barcode**, **Call #**, or **Accession Date**) to help you differentiate one copy from another.

Step 7. Select a new policy for the individual copy from the copy **Policy** drop-down menu in the **Copy Info** subtab (e.g. **eBook**).

Step 8. Click **Save** at the top-right of the window.

- NOTE -

Title and copy polices are synchronized when shared!

In other words, when *copies* have the same **Policy** as their adoptive *title*, their **Policy** will be changed when the **Policy** for the title record is changed. However, when a copy **Policy** *differs* from its title record, changing the tile **Policy** does *not* affect the copy policy.

Step-by-Step: Assigning Policies to Patrons

To assign a policy to a patron:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the main **Show** drop-down menu.

Step 2. The **Patron Management** window will appear.

Step 3. Use the **Patron Selection** window (Cmnd/Ctrl+F) to locate the patron whose policy you want to change.

Step 4. The patron you select will become current in the **Patron Management** window.

Step 5. Use the patron **Policy** drop-down menu (near the top of the window, located directly below the **Barcode** field) to select the new policy for this patron.

Step 6. Click **Save** at the top-right of the window.

Patrons Preferences

Patrons Preferences

Use the **Patrons Preferences** to configure grade tables, default pictures, barcode settings, security groups, policies, and other general information about your patrons.

Step 1. First, select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Patrons** icon in the **Management** section of the **Preferences** window.

Step 3. From the **Patron Rules** tab, check whether you want to keep patron history and whether or not to disable patron expiration dates.

Step 4. Under the **Patron Defaults** tab, set the **Default [Patron] Policy** and the **Next [Patron] Barcode** that Alexandria should use for newly created/imported patrons.

Step 5. If desired, using the **Patron Pictures** tab, you can adjust the generic **Male**, **Female**, or **Unknown** graphical placeholders for patrons; *see page 114*.

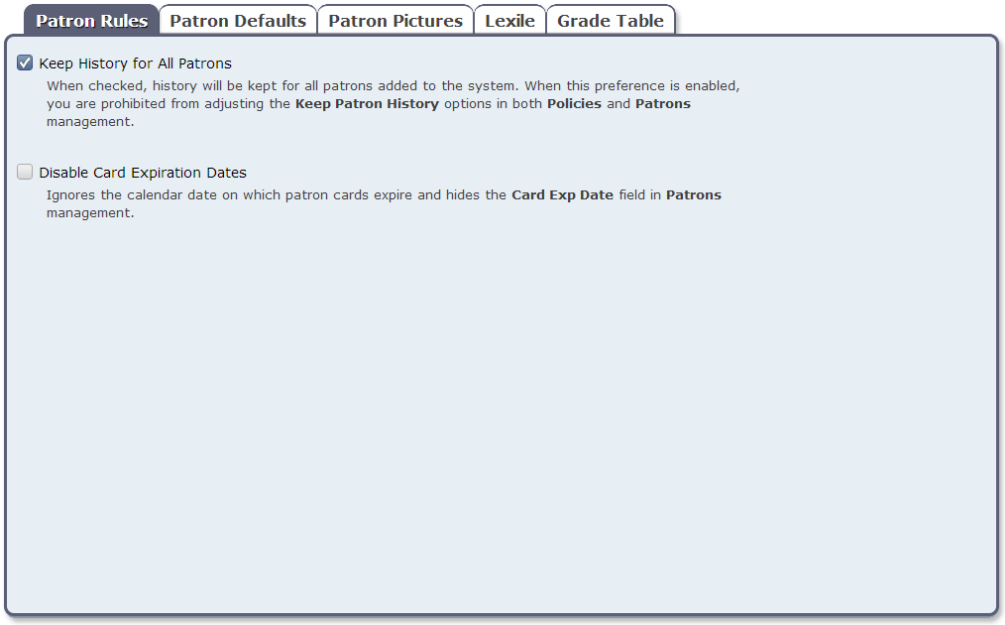
Step 6. Next, use the **Grade Table** tab to correctly create the grade levels that are used at your school or institution; *see page 115*.

Step 7. Click on **Save** in the upper-right corner of the window.

Step 8. Click **Show All** to return to the main **Preferences** window.

Patron Rules tab

Use the **Patron Rules** tab to forcibly set the default state of the **Keep Patron History** option for your patrons and also to enable/disable patron card expiration dates.

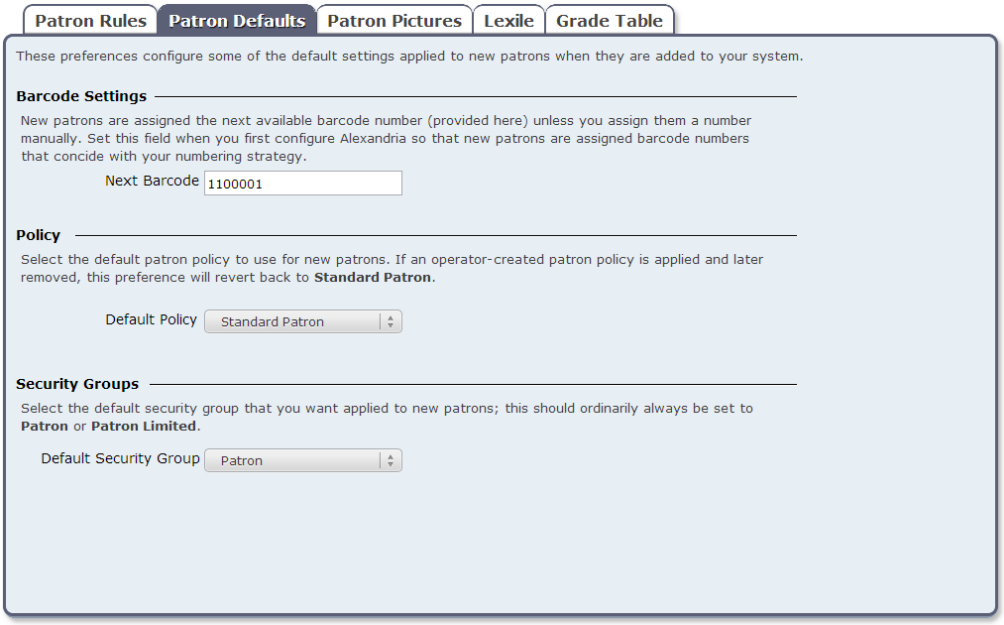

Patron Rules
Patron Defaults
Patron Pictures
Lexile
Grade Table
Keep History for All Patrons
When checked, history will be kept for all patrons added to the system. When this preference is enabled, you are prohibited from adjusting the Keep Patron History options in both Policies and Patrons management.
Disable Card Expiration Dates
Ignores the calendar date on which patron cards expire and hides the Card Exp Date field in Patrons management.

Patron Rules Settings

- **Keep History for All Patrons—**When checked, a complete transaction history will be kept for *all* the patrons who are added to your library system. When this preference is enabled, you are prohibited from adjusting the **Keep Patron History** options in both **Policies** and **Patron Management**.
- **Disable Card Expiration Dates—**When checked, the program will ignore the calendar date in which patrons' cards expire and hides the **Card Exp Date** field in the **Patron Management** window *(for more information, please review the "Personal Info tab" section of Alexandria's Online Help)*.

Patrons Defaults tab

Use these preferences to configure some of the default settings applied to new patrons when they are added to your system; for example, set the patron's **Default Policy** and **Next Barcode**.


Patron Rules
Patron Defaults
Patron Pictures
Lexile
Grade Table
These preferences configure some of the default settings applied to new patrons when they are added to your system.
Barcode Settings
New patrons are assigned the next available barcode number (provided here) unless you assign them a number manually. Set this field when you first configure Alexandria so that new patrons are assigned barcode numbers that concide with your numbering strategy.
Next Barcode
1100001
Policy
Select the default patron policy to use for new patrons. If an operator-created patron policy is applied and later removed, this preference will revert back to Standard Patron.
Default Policy
Standard Patron
Security Groups
Select the default security group that you want applied to new patrons; this should ordinarily always be set to Patron or Patron Limited.
Default Security Group
Patron

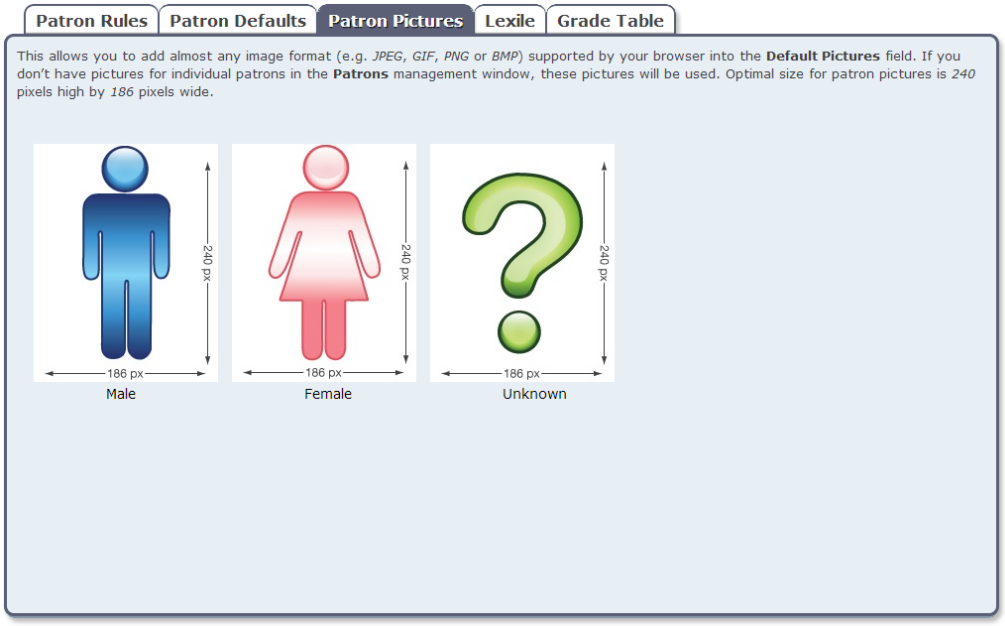
Patrons Defaults Settings

- **Next Barcode—**New patrons are assigned *this*, the next available barcode number, unless you assign them a number manually. You should set this field when you first configure Alexandria so that new patrons are assigned barcodes that coincide with your numbering strategy.
- **Default Policy—**Select the default patron policy to use for new patrons. If an operator-created patron policy is selected and later removed from your **Policies**, this preference will revert back to **Standard Patron**. Review the **Policies** section for more information about implementing policies for patrons and items.
- **Default Security Group—**Select the security group you want applied to new patrons by default; ordinarily, this should always be set to **Patron** or **Patron Limited**. Review the **Security** section *(page 65)* for more information about assigning (and removing) security groups for patrons and operators.

Patron Pictures tab

You can apply generic **Male**, **Female**, or **Unknown** images to patrons if they don't have an individual profile picture attached to their record in the **Personal Info** tab of the **Patron Management** window; pictures are assigned based on the **Sex** value selected for each patron.

You can affix nearly any image supported by your browser (commonly accepted formats are `JPEG`, `GIF`, `PNG`, or `BMP`) into one of the three gender-based patron picture fields. If you don't have individual patron portraits assigned in the **Personal Info** tab of the **Patron Management** window, *these* pictures will be used instead. Optimal image size for patron pictures is *186* pixels wide by *240* pixels high.


Patron Rules
Patron Defaults
Patron Pictures
Lexile
Grade Table
This allows you to add almost any image format (e.g. JPEG, GIF, PNG or BMP) supported by your browser into the Default Pictures field. If you don't have pictures for individual patrons in the Patrons management window, these pictures will be used. Optimal size for patron pictures is 240 pixels high by 186 pixels wide.
240 px
186 px
Male
240 px
186 px
Female
240 px
186 px
Unknown

Step-by-Step: Apply New Default Patron Pictures

Follow these steps to apply new gender-based patron picture defaults:

Step 1. Select (highlight) the default patron picture you would like to change (e.g. **Male**, **Female**, or **Unknown**).

Step 2. New default patron images should measure no larger than *186* pixels wide by *240* pixels high.

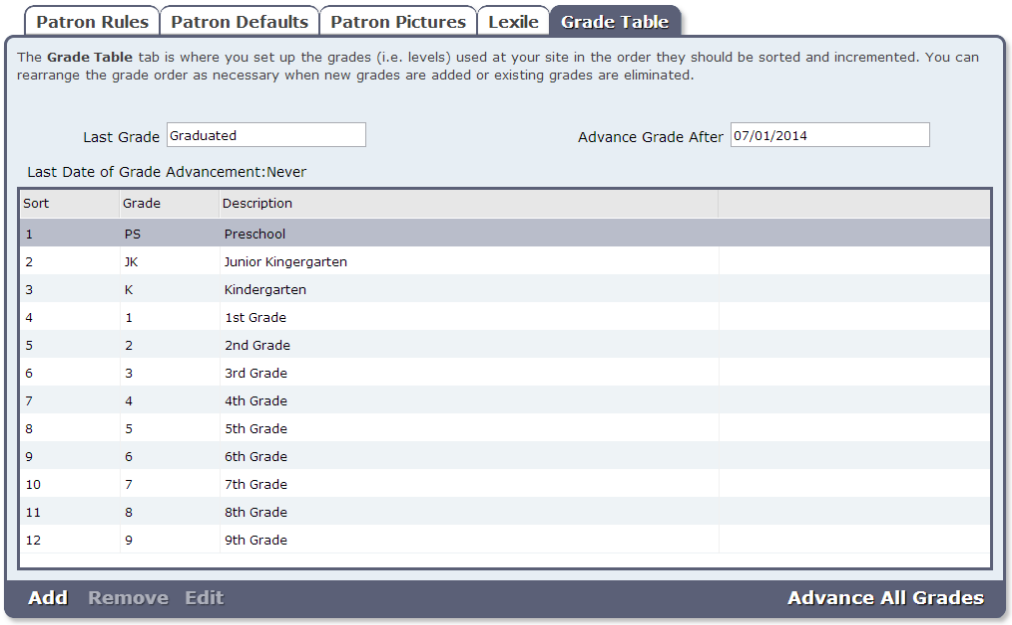
Step 3. New default patron images can be `JPEG`, `GIF`, `PNG`, or `BMP` (or any other image format that your browser supports).

Step 4. Drag-and-drop your new default patron image onto the **Default Picture** field.

Step 5. Click **Save** to apply your changes or **Revert** to discard them.

Grade Table tab

This preference is where you establish the grades (i.e. levels) that are relevant to your union. Most third party school information systems are capable of including **Grade** in their export files. However, if you are unable to import patron records with associated **Grades**, you can still assign grades via graduation date using the patron **Replace Information** utility *(see "Getting Started With Utilities" on page 209)*.


Patron Rules
Patron Defaults
Patron Pictures
Lexile
Grade Table
The Grade Table tab is where you set up the grades (i.e. levels) used at your site in the order they should be sorted and incremented. You can rearrange the grade order as necessary when new grades are added or existing grades are eliminated.
Last Grade Graduated
Advance Grade After 07/01/2014
Last Date of Grade Advancement:Never
Sort Grade Description
1 PS Preschool
2 JK Junior Kingergarten
3 K Kindergarten
4 1 1st Grade
5 2 2nd Grade
6 3 3rd Grade
7 4 4th Grade
8 5 5th Grade
9 6 6th Grade
10 7 7th Grade
11 8 8th Grade
12 9 9th Grade
Add Remove Edit
Advance All Grades

Individually enter each grade level relevant to your union *in the order they should be sorted and incremented*. This is a simple list; the first entry in the **Grade Table** will be your first grade level, the second will be the next grade level, etc. The **Grade** and **Description** entries in the table are *fully* customizable, allowing you to use whatever terminology you desire. Grades must be advanced manually at the end of each school year by using the **Advance All Grades** button or the **Advance Grade** utility. Using one of these utilities, you can advance your patrons to the next grade level until they reach the **Last Grade** level (e.g. **Graduated**); patrons will *never* advance past the **Last Grade** level.

Grade Table Settings

- **Last Grade—**This operator-defined field defines your patron's highest (and final) level of advancement. This level will be assigned to patrons who go beyond the levels defined in the **Grade Table**. Patrons will *not* be advanced out of this level when grades are advanced. Default is `Graduated` and the field *must* contain a value—it cannot be left blank.
- **Advance Grade After—**This value is used to compute the projected graduation date when importing `StudentPersonal` objects using **SIF**. Never rearrange the grade table if you are importing with SIF. Changing the **Advance Grade After** (usually graduation date) *does not* advance a **Grade**; changing a **Grade** *does not* change the graduation date.
- **Last Date of Grade Advancement—**This non-editable field shows when the latest **Advance All Grades** operation was performed; the date is updated after the utility has completed.
- **Advance All Grades—**Each time this is clicked, you essentially add one grade level to each of your patrons until they reach the **Last Grade** level (described above). To elucidate, each patron in your database that has been applied a level that you defined in your **Grade Table** will have their level transitioned to the next grade in the table. For example, a patron with the grade level of **6** will advance to **7**. COMPanion recommends that you perform an **Archive** before using the **Advance All Grades** button. Patrons whose grade/level is either not found or not defined in the **Grade Table** *will not* have their grade level advanced.

- WARNING-

Grades in the **Grade Table** need to *exactly match* the **Grade** entry in the **Patron Management** record *(see page 274)* for the **Advance All Grades** utility to work. Often, the grades defined in the patron record are mistakenly padded with "`0`"s which causes the **Advance Grade Utility** to fail.

Another example of an error-causing incongruence would be a patron with "`5th`" in the **Grade** field of their patron record when "`5`" is the standard defined in your **Grade Table** preferences.

Step-by-Step: Add New Grade Level

Step 1. Click **Add**; this will call forth the **Add New Grade** level roll-down, allowing you to add a new level to the grade table.

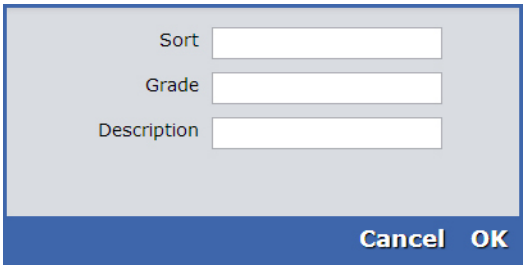
Step 2. First, indicate the **Sort** order for the grade. For example, if the earliest grade level you support is kindergarten, then "`1`" should be your **Kindergarten Sort** value. If, at a future date, you incorporate a new **Preschool** level and *that* becomes your new "`1`", then your **Kindergarten Sort** value will be automatically bumped to "`2`". The value you provide changes *where* the grade appears in the **Grade Table**; the **Sort** order also affects how grades are advanced.

Step 3. Next, provide a simple **Grade** name; this will appear in the **Grade** field of the **Patron Management** window, **Patron Details**, and **Patron Reports** among other places.

Step 4. Finally, provide an extended grade **Description**; this is commonly a more explanatory version of the **Grade** name. For example, your **Description** for grade "`7`" could be "`7th Grade`".

Step 5. When you are finished, click **OK** to continue.

Step 6. Finally, click **Save** to keep your new grade level or **Revert** to discard it.



Step-by-Step: Removing A Grade Level

To remove a grade from the table:

Step 1. Select (highlight) the grade that you would like eliminated and click **Remove**.

Step 2. When you are finished, click **Save** to keep your changes or **Revert** to discard them.

Step-by-Step: Editing A Grade Level

To edit existing information in the **Grade Table**:

Step 1. Select (highlight) the grade that you would like to modify and click the **Edit** button; this will call forth the **Edit Grade** level roll-down.

Step 2. You can edit information in the **Sort**, **Grade**, and **Description** fields. If you modify the **Sort** order, the grades in the table will be adjusted automatically.

Step 3. When you have finished making changes, click **OK**.

Step 4. Finally, click **Save** to keep your changes or **Revert** to discard them.

Items Preferences

Configuring Essential Item Preferences

The **Items Preferences** are used to configure general information about your catalog headings, default medium pictures, and leading articles.Not all of these preferences need to be configured during your initial setup of Alexandria. Listed below are those that COMPanion suggest that you initially set:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. First, click on the **Items** icon in the **Management** section of the **Preferences** window.

Step 3. In the **Item Defaults** tab *(page 120)*, provide the **Next [Item] Barcode** to be used during cataloging or importing. Note that this *must* be set individually for each site.

Step 4. In the **Temporary Items** section, configure the preferences that deal with your library's temporary barcode scheme.

Step 5. Under the **Cataloging** tab *(page 123)*, if there is a MARC tag and subfield where the **Local Call Number Tag** is to be stored, provide it in this field. If the **Local Call Number Tag** is used for an identifier in a Central Union environment, *do not* enter one.

Step 6. If you wish to use your existing call numbers instead of pulling from the call number tags that may be included in imported MARC records, check the **Preserve Existing Call Numbers** box.

Step 7. The **Cover Art** tab *(page 127)* allows users to apply pictures to individual or default mediums by dragging and dropping their own custom `JPGs`, `GIFs`, `BMPs`, or `PNGs` (or most standard image files).

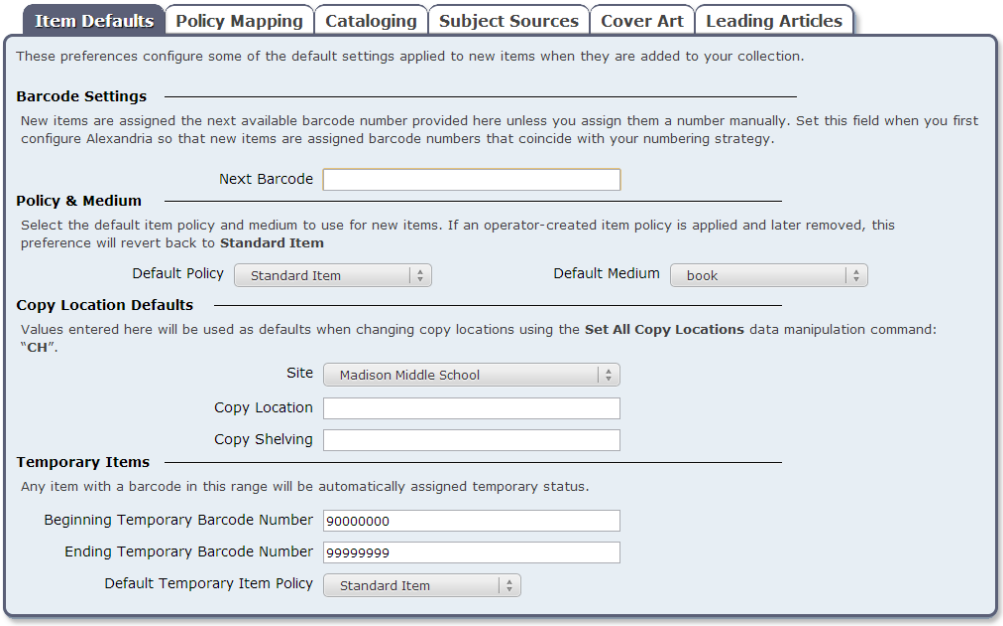
Step 8. Use the **Leading Articles** tab *(page 129)* to specify which leading articles (e.g. *the*, *an*, *a*) should be ignored during cataloging and searching. Since leading articles vary from language to language, this preference gives an operator total control over how they are defined.

Step 9. Configure any other required preferences you understand in the **Items** tab by checking the appropriate box(es), making a selection from the drop-down menu(s) or providing information in blank text fields.

Step 10. Click on **Save** in the upper-right corner of the window.

Item Defaults tab

These preferences configure some of the default settings that are applied to new items (i.e. title and copy records) when they are added to your collection.


Item Defaults
Policy Mapping
Cataloging
Subject Sources
Cover Art
Leading Articles
These preferences configure some of the default settings applied to new items when they are added to your collection.
Barcode Settings
New items are assigned the next available barcode number provided here unless you assign them a number manually. Set this field when you first configure Alexandria so that new items are assigned barcode numbers that coincide with your numbering strategy.
Next Barcode
Policy & Medium
Select the default item policy and medium to use for new items. If an operator-created item policy is applied and later removed, this preference will revert back to Standard Item
Default Policy
Standard Item
Default Medium
book
Copy Location Defaults
Values entered here will be used as defaults when changing copy locations using the Set All Copy Locations data manipulation command: "CH".
Site
Madison Middle School
Copy Location
Copy Shelving
Temporary Items
Any item with a barcode in this range will be automatically assigned temporary status.
Beginning Temporary Barcode Number
90000000
Ending Temporary Barcode Number
99999999
Default Temporary Item Policy
Standard Item

Barcode Settings

- **Next Barcode—**New copies are assigned the next available barcode number (shown here) unless you assign them a number manually. You should configure this setting when you initially set up Alexandria so that new copies are assigned barcode numbers that coincide with your numbering strategy.

Default Policy & Medium

Select the default item policy and medium to use for new title records.

- **Default Policy—**This drop-down menu allows you to select the default item **Policy** for newly added title records. The default is **Standard Item**. If an operator-created item policy is applied and later removed from the system, this setting will revert back to **Standard Item**.
- **Default Medium—**This drop-down menu allows you to select the default item **Medium** for newly added title records; the program default is **Book**.

Copy Location Defaults

Values entered here will be used as defaults when changing copy locations using the **Set All Copy Locations** data manipulation command: "CH". Also, during the data import process, if a **Site** code being imported doesn't match any that exist in the **Site Management** window, they will be replaced with the default copy **Site** code selected below.

- **Site—**Default value for the site field when changing copy locations; these are defined in the **Site Management** window.
- **Copy Location—**Default value for the copy location field when changing copy locations; the term used for "copy location" can be modified in your **Localization Preferences**.
- **Copy Shelving—**Default value for the copy sublocation field when changing copy locations; the term used for "copy shelving" can be modified in your **Localization Preferences**.

Temporary Items

Use these settings to establish a "temporary item" barcode range. Any item loaned using a temporary item barcode number is considered a "temporary" check out—but only *if* that number hasn't been previously assigned to a patron or an item.

A temporary item check out requires a barcode number that falls within *this* specified **Beginning / Ending Barcode Number** range:

- **Beginning Temporary Barcode Number—**Enter the *first* number of the barcode range that you want dedicated to temporary items. Default is 90000000.
- **Ending Temporary Barcode Number—**Enter the *last* number of the barcode range you want dedicated to temporary items. Default is 99999999.
- **Default Temporary Item Policy—**Select the default policy that Alexandria will use when calculating due dates and fines for temporary items. Review your **Policies Preferences** for more information on **Standard Item** and **System Item** policies. Default is **Standard Item**.

You can use “temporary” check outs to keep track of items in your library that can be loaned, but don't want part of your permanent collection. For example, you may want to track when newspapers, brochures, magazines, and other items are loaned and returned, but not inventory them due to their limited shelf life.

Temporary items are checked in and out the same as other items; they may be renewed and they can even elicit overdue fines. However, once the temporary item is checked back in, the transaction record and temporary item (barcode) information is removed from Alexandria without a trace.

While they are checked out, temporary items may appear in **Loaned Item** reports, **Patron Overdue Lists**, **Charges and Overdue Fines**, and **Lost Copies** reports. However, because they are *not* inventoried, they will not show on **Inventory** reports or **Shelf List Cards** reports. Additionally, a temporary item can *never* be found when searching your catalog. If you find that your “temporary” items circulate frequently, it may be better to permanently catalog them; otherwise information about them will need to be re-entered from scratch each time they are loaned.

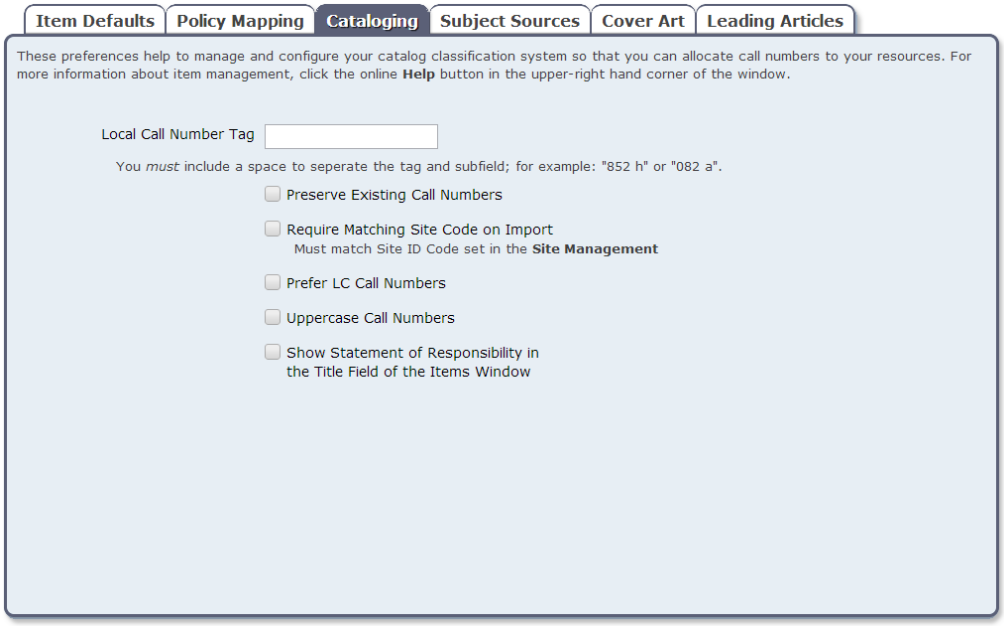
There are several ways to check out temporary items:

- You can prepare several temporary item check out cards with barcode numbers taken from your temporary barcode range (see above). When a temporary item is checked out, attach one of these cards. When the item is returned, remove the card and return it to the stack of temporary item check out cards to be reused for other temporary items.
- Another way to perform temporary checks out is to place a temporary item barcode number on *all* temporary items that might be checked out. The barcode is then used only for *that* item, but never permanently entered into Alexandria. For example, as newspapers are received daily, place a new temporary barcode label on them.

- NOTE -
You can print temporary item barcode labels using the **Custom Barcode Labels** report.

Cataloging tab

These preferences are used to help manage and configure your catalog classification system so that you can allocate call numbers to your resources.


Item Defaults
Policy Mapping
Cataloging
Subject Sources
Cover Art
Leading Articles
These preferences help to manage and configure your catalog classification system so that you can allocate call numbers to your resources. For more information about item management, click the online Help button in the upper-right hand corner of the window.
Local Call Number Tag
You must include a space to seperate the tag and subfield; for example: "852 h" or "082 a".
Preserve Existing Call Numbers
Require Matching Site Code on Import
Must match Site ID Code set in the Site Management
Prefer LC Call Numbers
Uppercase Call Numbers
Show Statement of Responsibility in the Title Field of the Items Window

Cataloging Settings

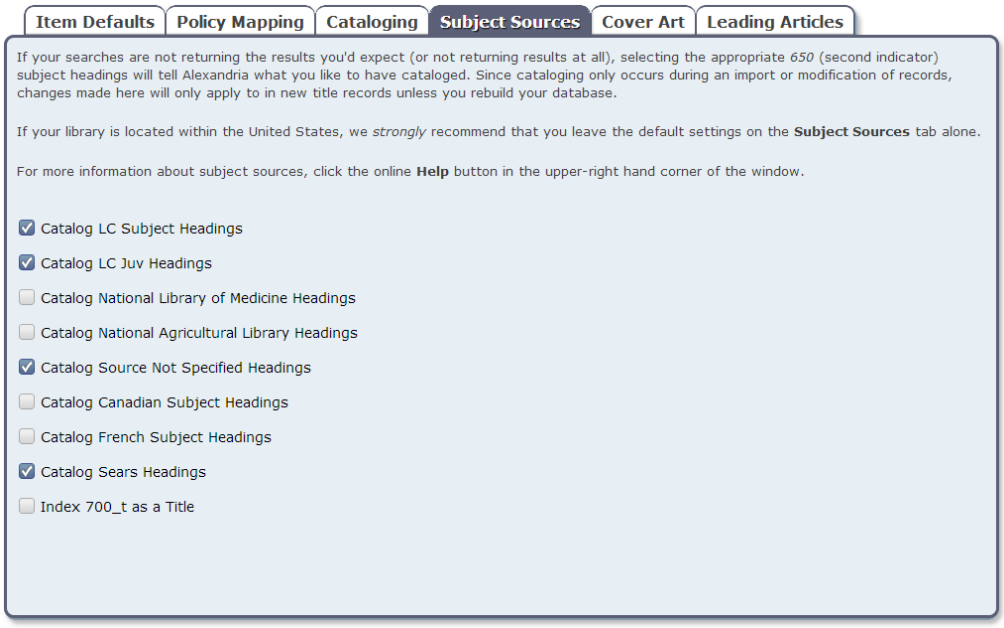
- **Local Call Number Tag—**During import, if your call numbers are not kept in the customary location within the MARC record (Alexandria uses **852_a**), this preference is used to configure where Alexandria should check first for the call number. If you enter a valid "`tag_subfield`," Alexandria will scan that point in the MARC record to find the call number. If your call numbers are typically in tag **900a**, enter "`900 a`" (omitting the quotation marks) in this field. Please note that you must include a space to separate the tag and subfield; for example: "`852 h`" or "`082 a`". The default setting is blank.

- **Preserve Existing Call Numbers—**When this box is checked, existing call numbers will never be modified during an import or during automatic SmartMARC record updating. Default is *unchecked*.

- **Require Matching Site Code on Import—**When this box is checked, only copy records with your site code (or no site code) in the **852_a** tag is imported.(i.e. the **Site** code *must* match one that exists in the **Site Management** window); all other **Site** codes are ignored. Some districts keep a Central Union catalog with *all* their district holdings. When these records are transferred to an individual site, each title may contain holding information for other sites in the union. This option allows each site to import the holding records that belong *only* to that site. Other holding records are automatically removed from the MARC record before it's saved. Default is *unchecked*.
- **Prefer LC Call Numbers—**When this box is checked, Alexandria looks first for a Library of Congress Call Number (in the **050** tag) when searching for call numbers in an imported MARC record. If no **050** tag is found, Alexandria will then search for call numbers in other tags. Do *not* check this preference if you use Dewey call numbers. Default is *unchecked*.
- **Uppercase Call Numbers—**When this box is checked, alphabetic characters in call numbers will be saved and displayed in uppercase (e.g. `FIC A`).
- **Show Statement of Responsibility in the Title Field of the Items Window—**When this box is checked, Alexandria shows the "Statement of Responsibility" tag **245_c** in the **Title** field of the **Item Management** window. Default is *unchecked*.

Subject Sources tab

If your searches are not returning the results you'd expect (or not returning results *at all*), selecting the appropriate *650* (second indicator) subject headings will tell Alexandria *what* you like to have cataloged. Since cataloging only occurs during an import or modification of records, changes made here will only be reflected in new records unless you rebuild your database. If you do not understand these settings, *please* talk to a qualified MLS librarian or MARC expert, call COMPanion's Technical Support team, or refer to "**650 - Subject Added Entry-Topical Term**" section of the Library of Congress website for more information about subject sources.


Item Defaults
Policy Mapping
Cataloging
Subject Sources
Cover Art
Leading Articles
If your searches are not returning the results you'd expect (or not returning results at all), selecting the appropriate 650 (second indicator) subject headings will tell Alexandria what you like to have cataloged. Since cataloging only occurs during an import or modification of records, changes made here will only apply to in new title records unless you rebuild your database.
If your library is located within the United States, we strongly recommend that you leave the default settings on the Subject Sources tab alone.
For more information about subject sources, click the online Help button in the upper-right hand corner of the window.
Catalog LC Subject Headings
Catalog LC Juv Headings
Catalog National Library of Medicine Headings
Catalog National Agricultural Library Headings
Catalog Source Not Specified Headings
Catalog Canadian Subject Headings
Catalog French Subject Headings
Catalog Sears Headings
Index 700_t as a Title

- NOTE-

If your site is located within the United States, COMPanion *strongly* recommends that you leave *all* of the default settings on the **Subject Sources** tab alone.

Subject Sources Settings: Second Indicators

- **Catalog LC Subject Headings** *(650 -0)*—When checked, subject headings are appropriate for use and conform to the *Library of Congress Subject Headings* (LCSH); also, the Name authority files that are maintained by the Library of Congress[1] will be keyworded. Default is *checked*.
- **Catalog LC Juv Headings** *(650 -1)*—When checked, subject headings conform to the "AC Subject Headings" section of the Library of Congress Subject Headings and is appropriate for use in the LC Annotated Card Program. Default is Default is *checked*.
- **Catalog National Library of Medicine Headings** *(650 -2)*—When checked, subject headings are appropriate for use and conform to the National Library of Medicine authority files. Default is *unchecked*.
- **Catalog National Agricultural Library Headings** *(650 -3)*—When checked, subject headings are appropriate for use and conform to the National Agricultural Library subject authority files. Default is *unchecked*.
- **Catalog Source Not Specified Headings** *(650 -4)*—When checked, unspecified catalog source headings will be keyworded (i.e. operator-supplied subject headings). Default is *checked*.
- **Catalog Canadian Subject Headings** *(650 -5)*—When checked, subject headings are appropriate for use and conform to the *Canadian Subject Headings* that are maintained by the Library and Archives Canada. Default is *unchecked*.
- **Catalog French Subject Headings** *(650 -6)*—When checked, subject headings conform to the *Répertoire de vedettes-matière* that is maintained by the Bibliothèque de l'Université Laval. Default is *unchecked*.
- **Catalog Sears Headings** *(650 -7)*—When checked, subject headings conform to a set of subject heading system/thesaurus building rules. Default is *checked*.
- **Index 700_t as a Title**—When checked, items with 700_t tags will be indexed as a title[2]. Default is *unchecked*.

650	-2	a	Horror
		v	Literary collections

1. The Library of Congress Subject Headings (LCSH) system was originally designed as a controlled vocabulary for representing the subject and form of the books and serials in the Library of Congress collection, with the purpose of providing specified, subject search criteria to the bibliographic records contained in the Library of Congress catalogs. As an increasing number of other libraries have adopted the Library of Congress subject headings system, it has become a tool for subject indexing of library catalogs in general. In recent years, it has also been used as a tool in a number of online bibliographic databases outside of the Library of Congress (e.g. Alexandria). A subject heading may consist of one or more words. A one-word heading represents a single concept, whereas a multiple-word heading may represent a single concept or multiple concepts. A subject heading representing a single concept may appear as a single word or a multiple-word phrase, usually an adjectival phrase but occasionally a prepositional phrase. Each such heading represents a single object or idea (Examples include: Automobiles, Botany, Budget deficits, Electric interference, Boards of trade, Clerks of court).
2.Catalogers of music (which also parallels other subjects) have developed a distinctive approach to the MARC tagging. In particular, they (along with their colleagues in literature, fine arts, and theology) rely upon the 700_t field for uniform work titles and authority control.

Cover Art tab

These preferences allows you to drag-and-drop nearly any image format (e.g. `JPEGs`, `GIFs`, `PNGs`, or `BMPs`) supported by your browser into the **Medium Picture** field. After completing this action, a new default image is applied to every *medium* (of that type) lacking an individual **Medium Picture** (as is the case with newly created mediums). Medium pictures are used in several areas of the program, including the **Circulation** window every time an item is made current. Medium pictures won't appear when an item has been assigned its own cover art from the **Item Management** window *(see "Item Management" on page 251)*.

Enabling the **Automatically Retrieve Cover Art During Idle Periods** utility allows Alexandria to search the world wide web for cover art for any title (using the title's ISBN) in your collection if that item is currently using one of the default Medium Picture images. As part of its daily chores, Alexandria will create a list of ISBNs for titles that lack their own unique cover art and will then search the internet for those images, one every ten seconds (during idle times), until every title in the list has been serviced. This utility will run in the background and requires no additional operator interaction.

Item Defaults
Policy Mapping
Cataloging
Subject Sources
Cover Art
Leading Articles
The Cover Art tab allows you to apply almost any image format (e.g. JPEG, GIF, PNG or BMP) supported by your browser into the Medium Picture field. Optimal size for medium pictures is 240 high pixels by 186 pixels wide at 72 ppi (pixels per inch) resolution.
Automatically Retrieve Cover Art During Idle Periods
Medium Types
ADOBE EPUB EBOOK
ADOBE PDF EBOOK
BOOK
BOOKS ON CD
ELECTRONIC RESOURCE
EQUIPMENT
MAGAZINE
MICROFORM
MUSIC CD
SAFARI MONTAGE
SOUND RECORDING
URL
VIDEORECORDING
Medium Picture
240 px
186 px
Drag pictures on to the image above to change the default item picture for the selected medium type.

Step-by-Step: Applying a New Medium Picture

Follow these steps to apply a new default medium picture:

Step 1. Select the medium type whose default picture you would like to change from the **Medium Types** field on the left-hand side of the window (e.g. **Book**).

Step 2. From your operating system (e.g. desktop), drag-and-drop your new medium image on to the **Medium Picture** field on the right-hand portion of the window.

Step 3. Click **Save** to apply your changes or **Revert** to discard them.

NOTE:
The **Default Picture** will apply to *all* mediums that do not have an overriding **Medium Picture**.

Default Medium Images

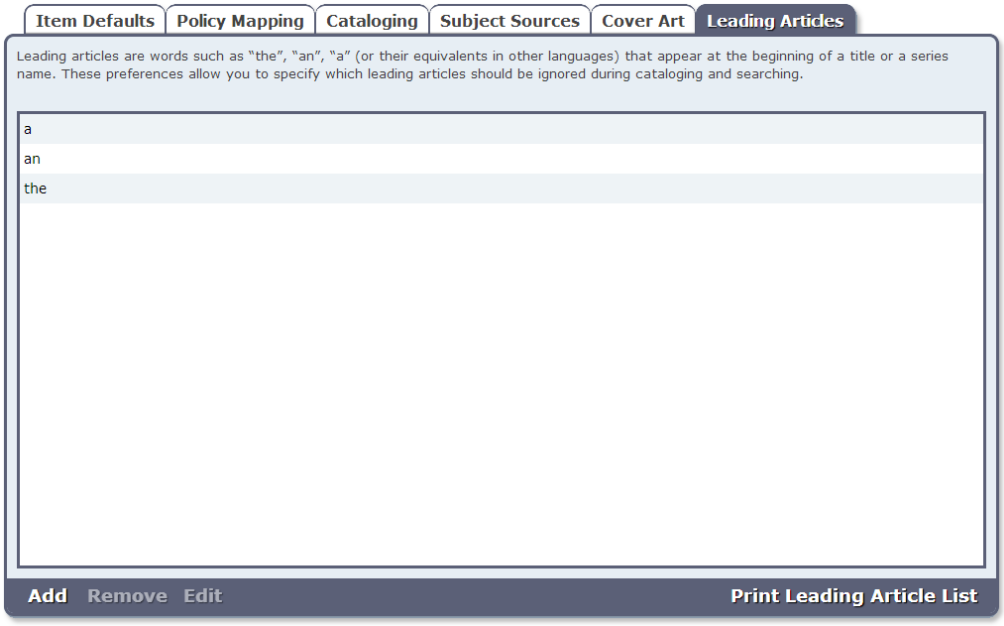
The following is a list of *mediums* that Alexandria supports by default; entering any of the terms *exactly* as they're shown below in the **New Medium** roll-down will populate the medium with a default image.

Art Original—Or also: “original art”, or “art”.
Art Reproduction—Or also: “reproduction”, “reproduction art”, or “print”.
Audiobook—Or also: “audiobook”, “book(s) on tape”, or “book(s) on cd”.
Book
CD-ROM—Or also: “dvd-rom”, or “bd-rom”.
Chart—Or also: “graph”.
File—Or also: “computer file”, “floppy disk”, “floppy disc”, “diskette”, or “software”.
Diorama—Or also: “model”.
Electronic Resource—Or also: “ebook”.
Equipment—Or also: “equipment”.
Filmstrip—Or also: “film reel”.
Flash Card
Game—Or also: “videogame”, “computer game”, or “board game”.
Graphic—Or also: “graphic novel”, “comic”, or “comic book poster”.
Kit—Or also: “study kit”.
Magazine—Or also: “periodical”, “rag”, or “zine”.
Microform—Or also: “microfilm”, “microfiche”, or “microcard(s)”.
Microscope Slide(s)
Music CD—Or also: “audio cd”, or “music”.
Picture—Or also: “picture”, “photograph”, “photography”, or “photo”.
Realia
Slide—Or also: “transparency”.
Sound Recording—Or also: “sound”, “audio recording”, or “audio”.
Technical Drawing—Or also: “blueprint”, “instructions”, or “instruction manual”.
Toy—Or also: “puzzle”.
URL—Or also: “website”, “http”, “www”, “uri”, or “web address”.

Leading Articles tab

Leading articles are words such as "*the*", "*an*", "*a*" (or their equivalents in other languages) that appear at the beginning of a title or a series name. This preference tab allows you to specify which leading articles (e.g. "*the*", "*an*", "*a*") should be ignored during cataloging and searching. Since leading articles and punctuation vary from language to language, this preference gives an operator total control over how they are defined and how they affect searching and selections in various areas of Alexandria.

Click **Print Leading Article List** in the bottom-right corner of the tab to print a convenient list that contains all the leading articles you've provided in the field (shown below).


Item Defaults
Policy Mapping
Cataloging
Subject Sources
Cover Art
Leading Articles
Leading articles are words such as "the", "an", "a" (or their equivalents in other languages) that appear at the beginning of a title or a series name. These preferences allow you to specify which leading articles should be ignored during cataloging and searching.
a
an
the
Add
Remove
Edit
Print Leading Article List

Leading Articles Settings

Where is this preference used; what does this preference affect?

- Titles beginning with these leading articles will be sorted by the next available word. The second indicator of the **245** tag is automatically set to the correct MARC standard value for the skipped leading article.
- Series beginning with these leading articles are sorted by the next available word. The second indicator of the **830** tag is automatically set to the correct MARC standard value for the skipped leading article.
- When Alexandria searches for titles, queries that begin with a leading article will automatically skip that term. Thus, a query for "*The Cat in the Hat*" will actually search for "*Cat in the Hat*."
- When searching for a series, queries beginning with a leading article will automatically skip that term. Thus, a query for "*The Wizard of Oz*" will actually search for "*Wizard of Oz*.".

Notes:

Barcodes Preferences

The **Barcodes Preferences** allow you to configure how Alexandria increments new patron and item barcode numbers, define the barcode range for temporary items, and establish any special barcode handling. For instance, if your data contains Follett Proprietary Interleaved 2 of 5 barcodes, indicate that here so that Alexandria is aware and can handle them properly; if your patron/item barcodes have leaders that should be skipped, provide that information here as well. We *strongly* recommend that you *never* adjust any of the settings in the **Advanced Options** roll-down unless you are specifically directed to do so by COMPanion's Technical Support team—improper usage can irrecoverably damage your data.

Getting Started With Barcodes Preferences

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Barcodes** icon in the **Configuration** section of the **Preferences** window.

Step 3. If your item/patron barcodes have leaders that should be skipped, enter the leader in the **Barcode Leaders** section *(page 133)*.

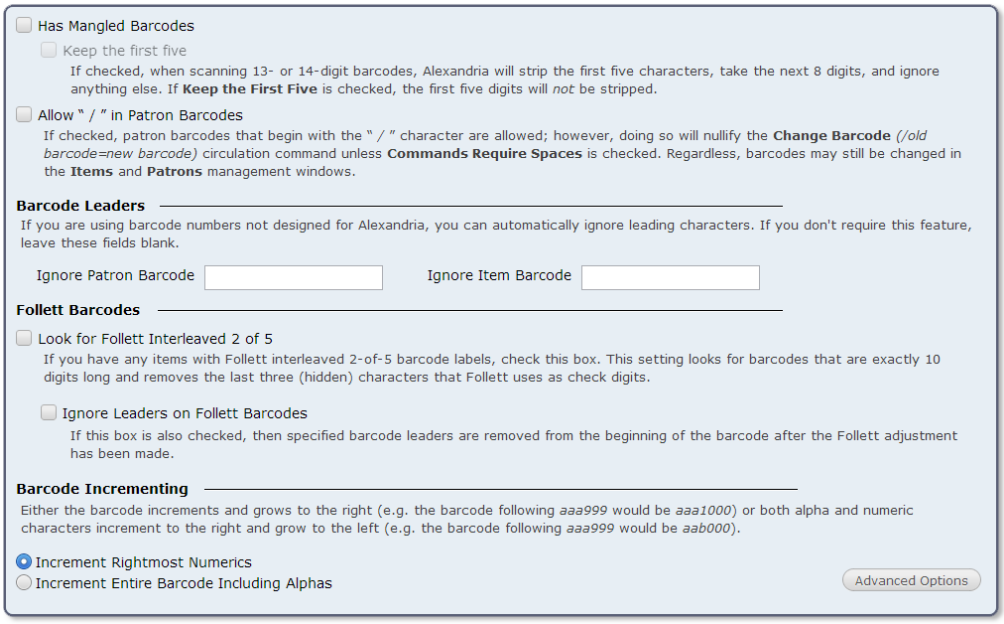
Step 4. In the **Barcode Incrementing** section, configure how Alexandria handles new barcodes assigned to patrons and/or items *(page 134)*.

Step 5. Click on **Save** in the upper-right corner of the window.

Step 6. Click **Show All** to return to the main **Preferences** window.

Barcodes tab

The preferences determine how Alexandria handles your library's barcode scheme\.


Has Mangled Barcodes
Keep the first five
If checked, when scanning 13- or 14-digit barcodes, Alexandria will strip the first five characters, take the next 8 digits, and ignore anything else. If Keep the First Five is checked, the first five digits will not be stripped.
Allow " / " in Patron Barcodes
If checked, patron barcodes that begin with the " / " character are allowed; however, doing so will nullify the Change Barcode (/old barcode=new barcode) circulation command unless Commands Require Spaces is checked. Regardless, barcodes may still be changed in the Items and Patrons management windows.
Barcode Leaders
If you are using barcode numbers not designed for Alexandria, you can automatically ignore leading characters. If you don't require this feature, leave these fields blank.
Ignore Patron Barcode
Ignore Item Barcode
Follett Barcodes
Look for Follett Interleaved 2 of 5
If you have any items with Follett interleaved 2-of-5 barcode labels, check this box. This setting looks for barcodes that are exactly 10 digits long and removes the last three (hidden) characters that Follett uses as check digits.
Ignore Leaders on Follett Barcodes
If this box is also checked, then specified barcode leaders are removed from the beginning of the barcode after the Follett adjustment has been made.
Barcode Incrementing
Either the barcode increments and grows to the right (e.g. the barcode following aaa999 would be aaa1000) or both alpha and numeric characters increment to the right and grow to the left (e.g. the barcode following aaa999 would be aab000).
Increment Rightmost Numerics
Increment Entire Barcode Including Alphas
Advanced Options

Special Handling Settings

- **Has Mangled Barcodes—**If checked, when scanning 13- or 14-digit barcodes, Alexandria will strip off the first 5 characters, take the next 8 digits and ignore any remaining characters. Checking this box also makes the **Keep the First Five** option available.
- **Keep the First Five—**This option is inaccessible unless you have **Has Mangled Barcodes** checked. When checked, it ensures that the first five digits are *not* stripped when using the **Has Mangled Barcodes** preference.
- **Allow '/' in Patron Barcodes—**If checked, patron barcodes that begin with a forward slash character (" / ") are allowed. Barcodes can always be changed manually from the **Patron** and **Item Management** windows.

Barcode Leaders

When scannable barcodes are prefaced with supplementary characters extraneous to what is stored in your data, specify those 'leaders' *here* so that they will be ignored and your barcodes processed correctly when they are scanned. You are allowed to ignore a number of *multiple* patron/item leaders by separating them with commas (e.g. "ABC, DEF, XYZ"). If you don't require this feature, leave the fields blank.

- **Ignore Patron Barcode Leader of—**If otherwise valid patron barcodes have been augmented with preceding characters, you can choose to automatically ignore these 'leading' characters. For example, let's say that your scannable patron barcode labels have been prefaced with the characters PAT (short for "*patron*"); entering PAT in the **Ignore Patron Barcode Leader** field will cause Alexandria to disregard every instance of PAT it encounters at the *beginning* of a barcode so that it may locate a valid match in your database.

- **Ignore Item Barcode Leader of—**If otherwise valid item barcodes have been augmented with preceding characters, you can choose to automatically ignore these 'leading' characters. For example, let's say that your scannable item barcode labels have been prefaced with the characters ITM (short for "*item*"); entering ITM in the **Ignore Item Barcode Leader** field will cause Alexandria to disregard every instance of ITM it encounters at the *beginning* of a barcode so that it may locate a valid match in your database. Follett has been known to use the "T" (for library books) and "X" (for textbooks) barcode leaders to identify item records.

Follett Barcodes

By design, Follett Proprietary uses the **Interleaved 2 of 5** symbology; a 10-digit barcode number with seven eye-readable characters (or less) and *three* calculated check digits; they also use the following prefixes (i.e. 'leaders') that identify the record type: "**T**" for library books, "**X**" for textbooks, and "**P**" for patrons.

- **Look for Follett Proprietary Interleaved 2 of 5—**If items in your collection use *Follett Proprietary Interleaved 2 of 5* barcodes, check this box. This preference allows Alexandria to inspect every barcode in your database that is *exactly* 10-digits long, determine if it is a Follett barcode and, if so, remove the last three calculated check digits[1].

- **Ignore Leaders on Follett Barcodes—**Typically, if **Look for Follett Proprietary Interleaved 2 of 5** is checked *and* you've provided prefixes to ignore in the **Ignore Item Barcode Leader** of field, then only the **Look for Follett Proprietary Interleaved 2 of 5** check will be performed. However, if the **Ignore Leaders on Follett Barcodes** box is also checked, then any specified prefixes (i.e. item barcode leaders) will be removed from the beginning of the barcode after the **Look for Follett Interleaved 2 of 5** adjustment (check digit removal) has been made. This is because the barcode needs to be correctly identified as a 10-digit Follett Proprietary before stripping off leading characters; stripping prefixes *first* could shorten the barcode and compromise the functionality of the preference. Keep in mind that some of the prefixes Follett uses for type indicators (specifically " **T** " and " **X** ") are also Alexandria circulation commands; so be sure that "T, X" has been included in the **Ignore Item Barcode Leader** field.

1.Check digits are the last few characters in a barcode, used to verify that the other digits in the barcode have been read correctly. They are calculated using an algorithm based on the previous digits in the barcode; therefore, they are unique for every barcode. If the check digits at the end of the barcode all add up—calculated from the previous digits read by the scanner—then the system knows that the barcode has been read completely and accurately.

Barcode Incrementing

- **Increment Rightmost Numerics—** When selected, new barcodes only increment the rightmost numeric digits (even when using alphanumeric barcodes). In other words, when incrementing rightmost numerics, the barcode increments to the *right* and grows to the *right*. For example, the barcode following `aaa999` would be `aaa1000`. This is the default setting.
- **Increment Entire Barcode Including Alphas—** When selected, new barcodes modify both alpha and numeric characters, increment to the right, and grow to the left. For example, the barcode following `aaa999` would be `aab000`. The barcode `zzz999` becomes `1aaa000`, then `1aaa001`, then `1aaa002`, and so on and so forth; eventually becoming `1zzz999`, which then turns to `2aaa000`. Remember that, with this formula, *Z+1 = 1A*.

Advanced Options

For more information on what the **Repair Trailing Alpha Check Digit**, **Repair Trailing Numeric Check Digit**, **Ignore Leading Zeros on Barcodes**, and **Allow Spaces in Barcodes** options do, please refer to their associated sections in Alexandria's Online Help.

- WARNING-

These preferences are capable of modifying patron and item records by adding or removing characters in existing barcodes—improper usage can irrecoverably damage your data! We *strongly* recommend that you never adjust any of the settings in the **Advanced Options** roll-down unless you are specifically directed to do so by COMPanion's Technical Support team!

Circulation Preferences

Getting Started with Circulation Preferences

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Circulation** icon in the **Management** section of the **Preferences** window.

Step 3. In the **User Interaction** tab *(page 136)*, decide whether or not you would like to display the **Patron Lexile** levels.

Step 4. Also, COMPanion suggests that your **Check Out Options** be set to **Allow check in with confirmation during checkout**.

Step 5. In the **Circulation Rules** tab *(page 139)*, set whether or not items may be renewed when there are holds are pending, whether or not to show the patron name in the reservations window and other reservations-related preferences.

Step 6. Also, set whether or not to charge late fees on lost or found books, etc.

Step 7. In the **Receipts** tab *(page 142)*, determine what visual elements should appear on your receipts. Automatic receipt printing settings are located in your **Machine Preferences** *(for more information, please review the related section of Alexandria's Online Help)*. Of course, you can always use the <D> command to manually print transaction receipts.

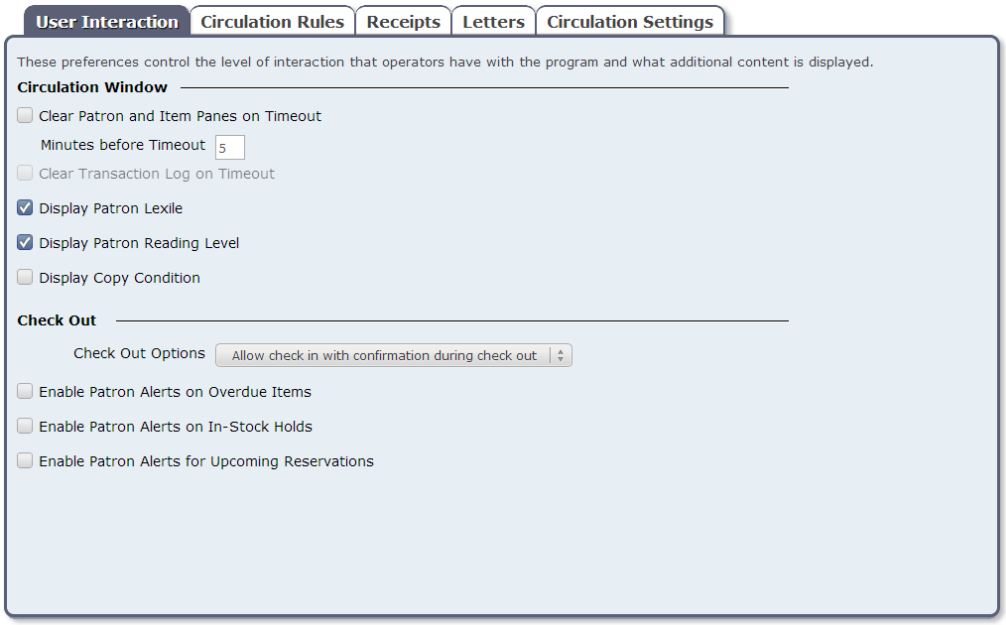
Step 8. In the **Letters** tab *(page 145)*, customize the messages in your letters (patron notices) sent from the library. This includes in-stock hold and overdue suspension notices, recall messages, etc.

Step 9. In the **Circulation Settings** tab *(page 146)*, for those in a Central Union environment, click on the **Interlibrary Loans** section; use this tab to adjust the periods required.

Step 10. Click on **Save** in the upper-right corner of the window.

User Interaction tab

The **User Interaction** preferences control the level of interaction that operators have with the program and what additional content is displayed. In the **Circulation Window** section, determine whether or not you would like to **Display Patron Lexile** levels. One of the most important preferences on this tab is the **Check Out** section; COMPanion recommends that **Allow check in with confirmation during checkout** be selected.


User Interaction
Circulation Rules
Receipts
Letters
Circulation Settings
These preferences control the level of interaction that operators have with the program and what additional content is displayed.
Circulation Window
Clear Patron and Item Panes on Timeout
Minutes before Timeout
5
Clear Transaction Log on Timeout
Display Patron Lexile
Display Patron Reading Level
Display Copy Condition
Check Out
Check Out Options
Allow check in with confirmation during check out
Enable Patron Alerts on Overdue Items
Enable Patron Alerts on In-Stock Holds
Enable Patron Alerts for Upcoming Reservations

Circulation Window

- **Clear Patron and Item Panes on Timeout—**If you have privacy concerns about the information displayed on the **Circulation** window, you can have Alexandria automatically clear the **Current Patron/Item** panes of the main **Circulation** window after a period of inactivity determined using the **Minutes Before Timeout** field (below). Please note that the **Circulation** can also be manually cleared at any time using the "`X <enter>`" command.

- **Minutes Before Timeout—**This field is inaccessible unless you have **Clear Patron and Item Panes on Timeout** checked. Provide the amount of time (in minutes) to wait before Alexandria clears the **Current Patron/Item** panes of the main **Circulation** window.

- **Clear Transaction Log on Timeout—**This checkbox is inaccessible unless you have **Clear Patron and Item Panes on Timeout** checked. When checked, you can also have the **Transaction Log** cleared when the **Current Patron/Item** panes are cleared on timeout. Please note that clearing the **Transaction Log** is purely cosmetic; all the data stored in your **Log** files are retained in your **Alexandria Support** folder.

- **Display Patron Lexile—**When checked, a patron's Lexile measurement is displayed (if provided in the patron **Lexile** tab) in the **Current Patron** section of the **Circulation** window, the Researcher, etcetera. If you have privacy issues concerning a patron's lexile information being displayed on the **Circulation** window, leave this box unchecked *(for more information, please review the "Lexiles" section of Alexandria's Online Help)*.

- **Display Patron Reading Level—**When checked, a patron's reading level is displayed (if provided in the patron **Personal Info** tab) in the **Current Patron** section of the **Circulation** window, the Researcher, etcetera; for more information, please review the **Reading Level** field in the **Personal Info** tab of the **Patron Management** window. If you have privacy issues concerning a patron's reading level information being displayed on the **Circulation** window, leave this box unchecked *(for more information, please review the "Reading Level" section of Alexandria's Online Help)*.

- **Display Copy Condition—**When checked, the copy's condition is displayed in the **Current Item** pane of the **Circulation** window, the Researcher, etcetera; for more information, please review the copy **Condition** field in the **Copy Info** subtab of the **Item Management** window. **Condition** codes are created and maintained in the **Condition Codes** preferences window *(for more information, please review the "Copy Condition section of Alexandria's Online Help)*.

Check Out

These settings are sometimes useful when your site has need of separate Workstations—some that only allow bookdrop and others that only allow check out. However, the **Self-Service** module serves these needs far, *far* better.

- **Check Out Options—**This drop-down menu allows you to change the default functionality and customize the behavior of the **Check Out (.)** mode. You may select one of three options:

- **Allow check in during check out—**The default selection; this option allows items to be bookdropped when the **Circulation** window is in **Check Out (.)** mode.

- **Allow check in with confirmation during check out—**If selected, the program will not allow an item (or items) to be bookdropped or renewed during **Check Out (.)** mode without operator confirmation.

- **Don't allow check in during check out—**If selected, the program will not allow items to be bookdropped or renewed when the **Circulation** window is in **Check Out (.)** mode. For example, if you attempt to bookdrop an item that a patron currently has checked out—or you mistakenly scan the item barcode *twice* during the original transaction—the request is ignored and you are informed that bookdrops aren't allowed during check out. However, regardless of this setting, if you attempt to check out an item that is currently loaned to a different patron, a **Message** dialogue appears, allowing you to perform a *soft* bookdrop followed by an immediate checkout (i.e. transfer) to the new patron.

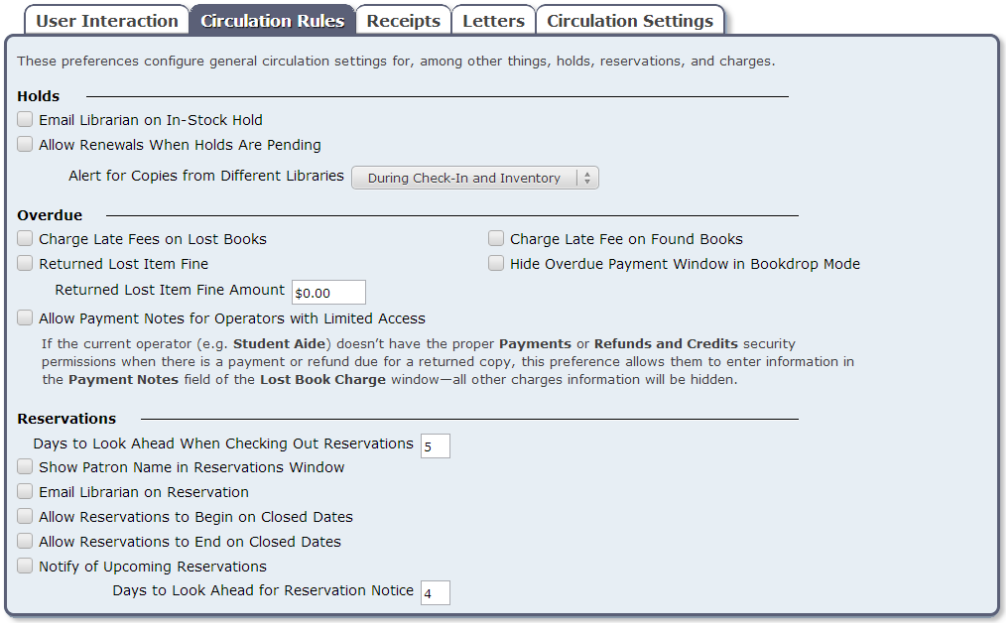
Patron Alerts

These preferences configure patron alerts for overdue items, in-stock holds, and upcoming reservations; if you would like an alarm sound to occur when a patron with *charges* (i.e. fines) is made current, make sure the **Alert When Fines Exceed** setting in your **Patron Check Out Policies** is properly configured.

- **Enable Patron Alerts on Overdue Items—**When checked, an alert message and sound will occur when a patron with overdue items is made current.
- **Enable Patron Alerts on In-Stock Holds—**When checked, an alert message and sound will occur when a patron with available in-stock holds is made current.
- **Enable Patron Alerts for Upcoming Reservations—**When checked, an alert message and sound will occur when a patron with upcoming reservations is made current.

Circulation Rules tab

These preferences configure general circulation settings for, among other things, holds, reservations, and charges.


User Interaction
Circulation Rules
Receipts
Letters
Circulation Settings
These preferences configure general circulation settings for, among other things, holds, reservations, and charges.
Holds
Email Librarian on In-Stock Hold
Allow Renewals When Holds Are Pending
Alert for Copies from Different Libraries
During Check-In and Inventory
Overdue
Charge Late Fees on Lost Books
Charge Late Fee on Found Books
Returned Lost Item Fine
Hide Overdue Payment Window in Bookdrop Mode
Returned Lost Item Fine Amount
$0.00
Allow Payment Notes for Operators with Limited Access
If the current operator (e.g. Student Aide) doesn't have the proper Payments or Refunds and Credits security permissions when there is a payment or refund due for a returned copy, this preference allows them to enter information in the Payment Notes field of the Lost Book Charge window—all other charges information will be hidden.
Reservations
Days to Look Ahead When Checking Out Reservations
5
Show Patron Name in Reservations Window
Email Librarian on Reservation
Allow Reservations to Begin on Closed Dates
Allow Reservations to End on Closed Dates
Notify of Upcoming Reservations
Days to Look Ahead for Reservation Notice
4

Holds Settings

- **Email Librarian on In-Stock Hold—**When checked, Alexandria will use the **Email** address(es) specified in the **Site Management** window *(page 48)* to notify operator(s) when an item status changes to **In-Stock Hold**.

- **Allow Renewals When Holds Are Pending—**When checked, patrons are allowed to renew items which have hold requests pending from other patrons.

- **Alert for Copies from Different Libraries—**If you are part of a Central Union, this setting determines whether an alert sound and warning appear when items from outside locations (i.e. other sites in your union) are bookdropped, inventoried, or made current at your site. You may select one of three options:

- **Never—**When selected, an alert sound will *never* occur when outside items are bookdropped, inventoried, or made current at your site.

- **During Check In and Inventory—**When selected, a warning message and alert sound will *only* occur during bookdrop and inventory.

- **Always—**When selected, an alert sound will occur when outside items are bookdropped, inventoried, *or* made current at your site.

Overdue Settings

- **Charge Late Fees on Lost Books—**When checked, overdue fines continue to accumulate on lost items up to the **Maximum Fine for an Overdue Item** set in your **Patron Policy Overdue** preferences. To stop fees from accumulating on a particular lost item, **Remove** the copy or assign it to the **Discarded System Patron**.

- **Charge Late Fees on Found Books—**If checked, when a lost item has been located, the patron who last had the item is charged an overdue fine for the period between when the item was lost and when it was found (up to the **Maximum Fine for an Overdue Item**). Also, when checked, the **Refund Lost Item Payment**, **Charge Overdue Fine** window appears when a lost item with an overdue fine is found. To stop fees from accumulating on a particular lost item, **Remove** the copy or assign it to the **Discarded System Patron**.

- **Hide Overdue Payment Window in Bookdrop Mode—**When checked, if the **Circulation** window is in **Bookdrop (B)** mode, a patron is automatically fined (without requiring operator interaction) when an overdue book is returned.

- **Returned Lost Item Fine—**Check this box if you'd like to withhold a monetary portion of the fine amount refunded to a patron when a lost item has been found.

- **Returned Lost Item Fine Amount—**Specify the monetary amount to withhold when refunding a fine for a lost item that has been found.

- **Allow Payment Notes for Operators with Limited Access—**If the current operator (e.g. **Student Aide**) doesn't have the proper **Payments** or **Refunds and Credits** security permissions when there is a payment or refund due for a returned copy, this preference allows them to enter information in the **Payment Notes** field of the **Lost Book Charge** window—all other charges information will be hidden.

Reservations Settings

- **Days to Look Ahead When Checking Out Reservations—**This setting allows you to enter the number of days prior to a reservation's requested start date needed to prepare an item for reservation. This way, items with reservations can (a) be available for general circulation *X* number of days before their scheduled reservation start date, *and* (b) fulfill their requesting patron's reservation. During check in, if an item reservation is detected within this adjacent *"days ahead"* time period, Alexandria will notify the current operator. The "GG" and "GPP" circulation commands also take this setting into account before allowing you to check out an item that has a reservation. Regardless of your policies, when an item with a reservation is checked out to the requesting patron, the item due date will always be the reservation end date. The default *"days to look ahead"* value is set to **5**.

- **Show Patron Name in Reservations Window—**When checked, the **Reservations Calendar** will show a patron's name on days with existing reservations; also, a patron's name will appear when a copy is **Checked Out**, has an **In-Stock Hold**, or is **Reserved**. When *not* checked, only the patron's barcode will appear on those days to indicate that the copy is in use.

- **Email Librarian on Reservation—**When checked, Alexandria will use the **Email** address(es) specified in the **Site Management** window *(page 48)* to notify operator(s) when a patron places a reservation on an item.

- **Allow Reservations to Begin on Closed Dates—**When checked, patrons are allowed to place a **Reservation** that begins on a **Closed** calendar day (e.g. **Saturday** or **Sunday**). This is the first day that an item can be picked up or checked out.

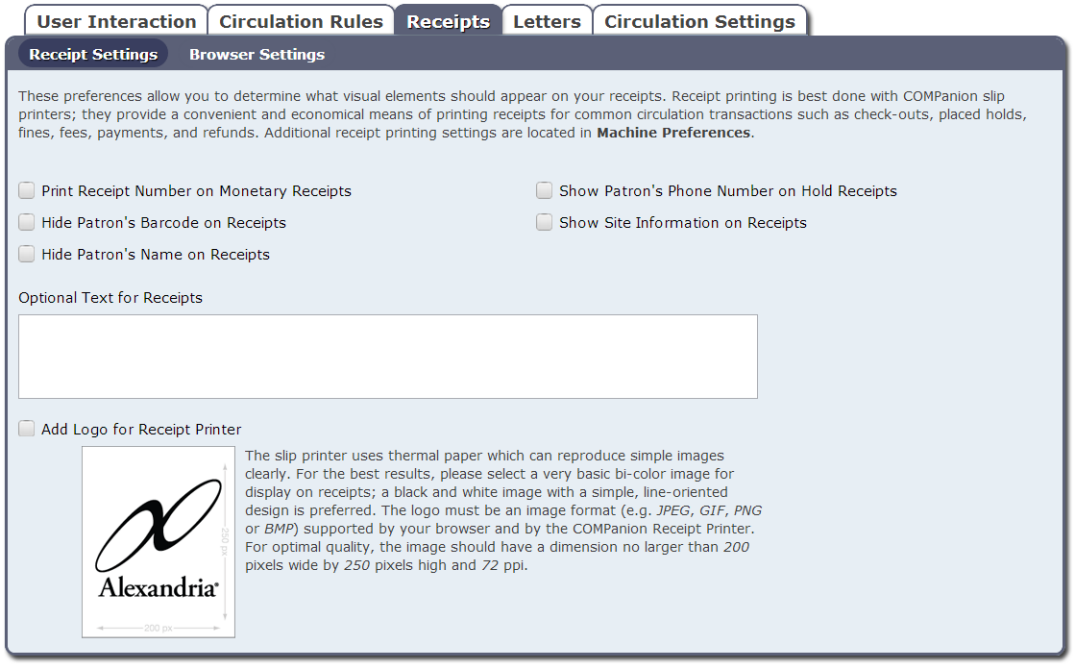
- **Allow Reservations to End on Closed Dates—**When checked, patrons are allowed to place a **Reservation** that ends on a **Closed** calendar day (e.g. **Saturday** or **Sunday**).

- **Notify of Upcoming Reservations—**Send email notifications to patrons with upcoming reservations.

- **Days to Look Ahead for Reservation Notice—**Enter the number of days that Alexandria looks ahead before emailing upcoming reservation notifications (above); default is **4** days.

Receipts tab

If you print receipts for patrons at your site, these preferences allow you to customize the information printed on your receipts; this information applies whether you print an 8½" x 11" receipt from a local or network printer or a 3" receipt from one of COMPanion's **Slip** or **Receipt Printers**. The settings that configure when receipts are printed can be located in **Machine Preferences**.


User Interaction
Circulation Rules
Receipts
Letters
Circulation Settings
Receipt Settings
Browser Settings
These preferences allow you to determine what visual elements should appear on your receipts. Receipt printing is best done with COMPanion slip printers; they provide a convenient and economical means of printing receipts for common circulation transactions such as check-outs, placed holds, fines, fees, payments, and refunds. Additional receipt printing settings are located in Machine Preferences.
Print Receipt Number on Monetary Receipts
Hide Patron's Barcode on Receipts
Hide Patron's Name on Receipts
Show Patron's Phone Number on Hold Receipts
Show Site Information on Receipts
Optional Text for Receipts
Add Logo for Receipt Printer
Alexandria
The slip printer uses thermal paper which can reproduce simple images clearly. For the best results, please select a very basic bi-color image for display on receipts; a black and white image with a simple, line-oriented design is preferred. The logo must be an image format (e.g. JPEG, GIF, PNG or BMP) supported by your browser and by the COMPanion Receipt Printer. For optimal quality, the image should have a dimension no larger than 200 pixels wide by 250 pixels high and 72 ppi.

Receipt printing is best done with COMPanion slip printers; they provide a convenient and economical means of printing receipts for common circulation transactions such as check outs, placed holds, fines, fees, payments, and refunds. If you are interested in licensing use of COMPanion's slip printer component, contact your sales representative at *(800) 347-6439* and ask about part V4007. If you have already licensed use of COMPanion's receipt printer component for Alexandria and need further information or assistance with setup, operation, and maintenance, please call COMPanion Technical Support at *(800) 347-4942* or email `support@companioncorp.com`.

Receipt Settings

- **Print Receipt Number on Monetary Receipts—**If checked, then a receipt number will be printed on monetary receipts.
- **Hide Patron's Barcode on Receipts—**Obscures a patron's barcode with asterisks (e.g. " * ") for check in/out receipts.
- **Hide Patron's Name on Receipts—**When checked, receipts will print a patron's initials instead of their full name.
- **Show Patron's Phone Number on Hold Receipts—**When checked, a patron's *phone number* will be included on printed stock hold slips. You may **Print** these slips using the dialog box that appears when a currently checked out item with a hold is bookdropped or by using the **Holds** subtab of the **Circulation** window. The item with the in-stock hold can then be set aside—slip attached—and the requesting patron contacted (via telephone) at your leisure.
- **Show Site Information on Receipts—**When checked, your site's name, address and contact information is included on *all* receipt types.

- **Optional Text for Receipts—**This is a customizable text header that appears before the general header (or after the patron name on in-stock hold receipts). This header will be centered horizontally and can be as many lines as are required by the user.

This is an optional feature of Alexandria; you *must* purchase and register a **Slip Printer** license in order for this preference to appear.

- **Add Logo for Receipt Printer—**The slip printer uses thermal paper which can reproduce simple images clearly. For the best results, please select a very basic bi-color image for display on receipts; a black and white image with a simple, line-oriented design is preferred. The logo must be an image format (e.g. `JPEG`, `GIF`, `PNG`, or `BMP`) supported by your browser and by the COMPanion Receipt Printer. For optimal quality, the image should have a dimension no larger than *200* pixels wide by *250* pixels high and *72* ppi. Please review the sample slip printer logo in the margins.

This is an optional feature of Alexandria; you *must* purchase and register a **Slip Printer** license in order for this preference to appear.

Browser Settings

These preferences activate COMPanion-compatible printers which provide convenient and economical means of printing receipts for common circulation transactions such as check outs, placed holds, fines, fees, payments, and refunds. To set receipt preferences on an *installed* Librarian Workstation use the settings found in **Machine Preferences**.

- **Use Star Slip Printer—**Use Star 613 Slip Printer. Receipts for **Check Outs**, **Check Ins**, **In-Stock Holds**, etc., will be formatted to fit on the slip printer. This option is available for Macintosh OS 10.6 and greater, and Windows.

- **Open Cash Drawer on Payment—**When the **Open Cash Drawer** button (designed to function with COMPanion's optional slip printer hardware) is clicked, it will automatically open the cash drawer. If you are interested in purchasing Alexandria's cash drawer component, contact your sales representative at *(800) 347-6439* and ask about parts V4200 or V4202. If you have already purchased COMPanion's cash drawer component for Alexandria and need further information or assistance with setup, operation, and maintenance for the system, please call COMPanion Technical Support at *(800) 347-4942* or email:
  `support@companioncorp.com`.
- **Always Print Receipts on Check Out—**When checked, Alexandria will automatically print a receipt for every item that is checked out. This receipt contains information similar to that which is displayed when you click on the current item's **Details** button. When not checked, receipts can be printed manually using the "`D`" or "`QP`" command in the **Circulation** window at the end of a transaction.
- **Always Print Receipts on Check In—**When checked, Alexandria will automatically print a receipt for every item that is checked in. This receipt contains information similar to that which is displayed when you click on the current item's **Details** button. When not checked, receipts can be printed manually using the "`D`" command in the **Circulation** window at the end of a transaction.
- **Always Print Receipts for Renewals—**When checked, Alexandria will automatically print a receipt for every item that is renewed. This receipt contains information similar to that which is displayed when you click on the current item's **Details** button. When not checked, receipts can be printed manually using the "`D`" command in the **Circulation** window at the end of a transaction.

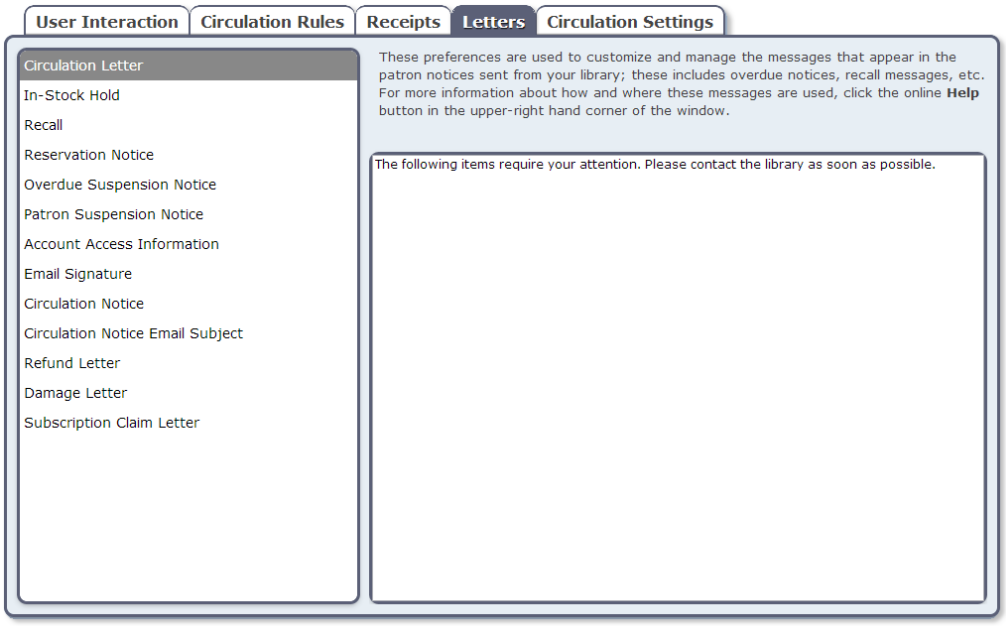
  Number of Check Out Receipts to Print—This indicates the number of receipts that will be automatically printed on check out, check in, or renewal.
- **Default is Print for In-Stock Hold Receipts—**When checked, Alexandria will automatically print a receipt when an item becomes an in-stock hold.

  Number of In-Stock Hold Receipts to Print—This indicates the number of in-stock hold receipts that are automatically printed when an in-stock hold request is made.
- **Default is Print for Payments and Refunds Receipts—**When checked, Alexandria will automatically print receipts for payments and refunds.

  Number of Receipts for Monetary Transactions—This indicates the number of receipts that will be automatically printed for monetary transactions such as refunds and payments.

Letters tab

These preferences are used to customize and manage the messages that appear in the patron notices sent from your library; these includes in-stock hold and overdue suspension notices, recall messages, etc. For more information about how and where these messages are used, please see the related **Letters** preference section in our Online Help.


User Interaction
Circulation Rules
Receipts
Letters
Circulation Settings
Circulation Letter
In-Stock Hold
Recall
Reservation Notice
Overdue Suspension Notice
Patron Suspension Notice
Account Access Information
Email Signature
Circulation Notice
Circulation Notice Email Subject
Refund Letter
Damage Letter
Subscription Claim Letter
These preferences are used to customize and manage the messages that appear in the patron notices sent from your library; these includes overdue notices, recall messages, etc. For more information about how and where these messages are used, click the online Help button in the upper-right hand corner of the window.
The following items require your attention. Please contact the library as soon as possible.

Step-by-Step: Customizing Letters & Notices

To replace or modify the text of a notification/letter:

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Circulation** icon in the **Management** section of the **Preferences** window.

Step 3. Click on the **Letters** tab.

Step 4. Select (highlight) the notice to be changed from the **Letter Type** section.

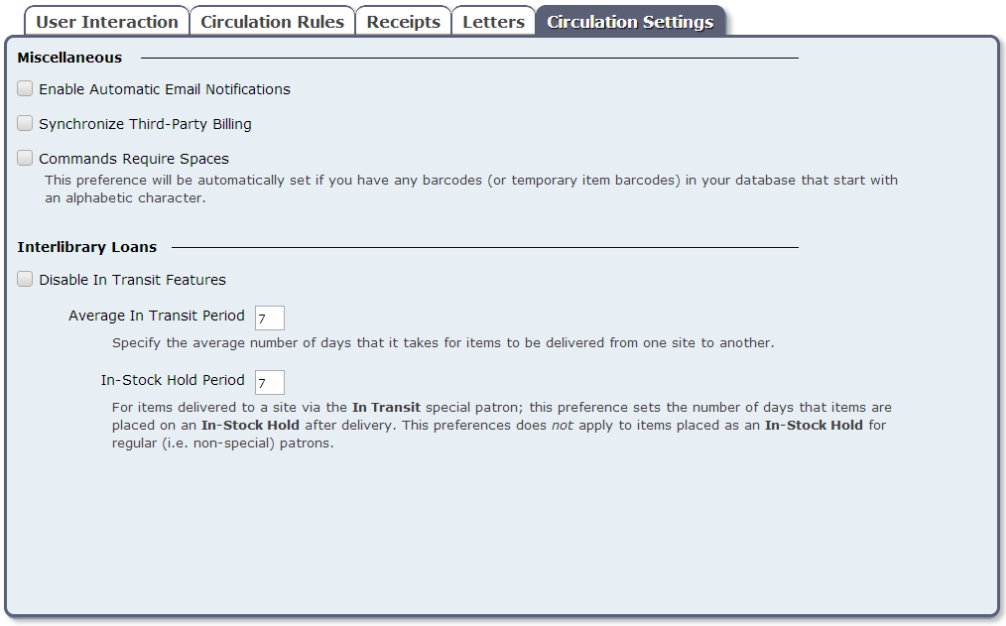
Step 5. Select (or highlight) the text to be modified and press `<delete>`.

Step 6. Replace or modify the desired text.

Step 7. Click **Save** to keep your changes or **Revert** to discard them.

Circulation Settings tab

These preference contain some general circulation settings. For those in a Central Union environment, the **Interlibrary Loans** settings configure the default time periods (in days) allowed for items "in transit" or "in-stock" before showing up in the **In Transit - Late In Arriving** report.


User Interaction
Circulation Rules
Receipts
Letters
Circulation Settings
Miscellaneous
Enable Automatic Email Notifications
Synchronize Third-Party Billing
Commands Require Spaces
This preference will be automatically set if you have any barcodes (or temporary item barcodes) in your database that start with an alphabetic character.
Interlibrary Loans
Disable In Transit Features
Average In Transit Period
7
Specify the average number of days that it takes for items to be delivered from one site to another.
In-Stock Hold Period
7
For items delivered to a site via the In Transit special patron; this preference sets the number of days that items are placed on an In-Stock Hold after delivery. This preferences does not apply to items placed as an In-Stock Hold for regular (i.e. non-special) patrons.

Miscellaneous

- **Enable Automatic Email Notifications—**Check this box if you want to email confirmations and notices automatically sent to patrons with valid email addresses when the following events occur: a hold is placed, a hold expires, an in-stock hold is available, an in-stock hold expires, item becomes overdue, and a recall is issued. To make this option available and to guarantee that your email notifications are being sent, you must have a valid **Library Email Address** (**Site Management**; *page 41)*, a valid patron email address (**Patron Management**; *page 271*), and *this* **Enable Automatic Email Notifications** box checked.

- **Synchronize Third-Party Billing—**Checking this box creates a **SyncFolder** inside the **Alexandria Support** folder. Every time a financial transaction event occurs in Alexandria (e.g. declaring an item lost, charging a patron an overdue/damage charge or fee, applying a payment, issuing a refund, or removing/editing a charge), the event will be logged and written to a *ToPOS* text file located within the **SyncFolder**. This folder is accessible to compatible third-party billing systems, allowing them to import (and even export in return) text files containing these detailed transaction records. For more information on the **Synchronize Third-Party Billing** preference, see the related sections in our Online Help.

Interlibrary Loans

- **Disable In Transit Features—**When this box is checked, In-Transit features are disabled (e.g. circulation commands "CH", "IT", "NT", "NTD", and **System Patron 9**); the only In-Transit related operation that can be performed is **Bookdrop**.

- **Average In Transit Period—**Specify the average number of days that it takes for items to be delivered from one site to another. Once this time period has elapsed, if the item has not been received at the expecting site, it will appear in the **In Transit - Late In Arriving** report. Default is **7**.

- **In-Stock Hold Period—**For items delivered to a site via the **In Transit** system patron; this preference sets the number of days that an item (or items) are placed on an **In-Stock Hold** after delivery. This preference overrides the **Days to Keep an In-Stock Hold Request** patron policy, however, it does *not* apply to items placed on **In-Stock Hold** for regular (i.e. non-system) patrons. Default is **7**.

Notes:

Researcher Preferences

An Introduction to the Researcher

Alexandria's Researcher is an exquisitely robust, visually engaging, and genuinely intuitive library search interface that appeals to both young and old. Patrons and operators are able to search authorized collections over the world wide web; access to wide area network (i.e. "local") collections requires an Alexandria WAN license and must be configured in your hosted Data Station's **Administration** settings *(page 61)*.

The Researcher can be accessed from your Librarian Workstation's default web browser when selecting **Researcher** from the main **Show** menu. Otherwise, patrons can access the Researcher to search library collections from around the world wide web by entering the IP address of your hosted Alexandria Data Station in the "URL" or "address" field of their favorite internet browser *(page 150)*.

Some features of the Researcher include:

- A single word performs an immediate smart search; on-the-fly toggling between simple, advanced, and study program searches.
- Clickable icons emphasize your **Most Popular** (highly circulated titles), **What's New?** (recent additions), and **Award Winners** (books of prestigious accolade).
- Multiple views for search results; virtually browse your shelves, cover by cover, without leaving the comfort of your chair; smoothly scroll from the very first call number to the last.
- Using pre- and post-**Filters**, you can refine your search results by limiting your fields to "author", "series", "medium", and more.
- Comprehensive title details provide ease-of-access to important information including, but not limited to, Lexiles, Study Programs, Point Counts, Interest and Reading Levels information, digital media, operator-approved websites, eBooks, and other less common resources.
- Save titles for later by dragging and dropping them into default or patron-created **Saved Lists** that provide patrons with a virtual place to keep lists of items they'd like to check out in the near or distant future.
- A supervised review system that allows patrons to publish and share their opinions while giving library administrators the ability to oversee and manage content.

How Do I Access the Alexandria Researcher?

You can access Alexandria's Researcher interface in a number of ways.

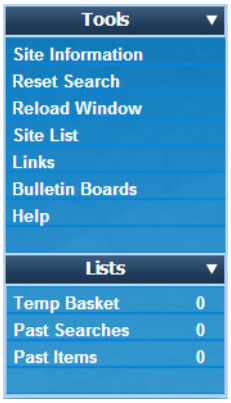
- Select Researcher from Alexandria's main **Show** menu.
- Double-click on the *"To access the Researcher"* link near the top of the **Transaction Log**.
- In the supported internet browser of your choice, type the IP address (or server domain name), port number, and (optional) serial number of your hosted Data Station followed by "*/researcher*" into your browser's **Address** field (usually located in the upper-left corner of the window).

If you are not sure what IP address (or server domain name) your hosted Data Station uses:

- It appears in the **Transaction log** of the main **Circulation** window each time your Librarian Workstation is launched; approximately three or four lines down.
- You can also locate your IP address under the **Network** header in the **System Info** subtab of the **Special** tab of the **Circulation** window.
- If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact COMPanion's Technical Support team by calling *(800) 347-4942* or via email at *support@companioncorp.com*.

In a Central Union environment, you can create bookmarks (i.e. links) to search specific schools without having to rely on cookies set at individual Researchers; this is done by including the **Site ID Code** in the web address. For example, if the COMPanion Middle School has a **Site ID Code** of `CMS`, you would enter the URL as: `http://Researcher IP Address:port/#site=CMS`.

Researcher Overview

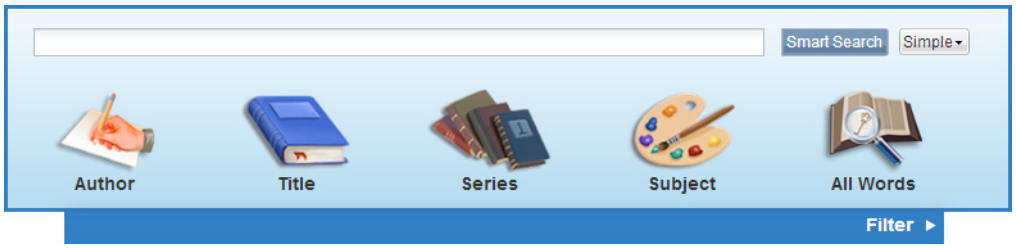


The main **Researcher** window can be divided into several distinct sections.

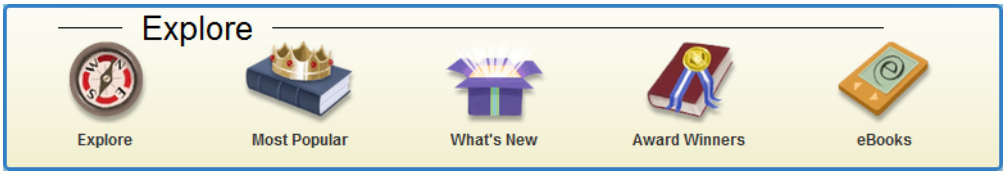
At the top of the window is a blue header bar that stretches from left to right.

The left-hand side of the window (shown on the right) contains the **Tools** and **Lists** selection menus and eventual post-search **Result Filters**.

At the outset, the larger, secondary section of the window is composed of a series of different **Search** options, filters, and panes; these include, but are not limited to the **Simple** and **Advanced** search, the **Explore** and **Extras** panes (which include **MackinVIA**, **netTrekker**, and **Capstone Interactive**).



- The **Simple** search is for those who don't have strong reading or writing skills. Enter a search term and then click an optional picture icon to perform the search (e.g. **Author**, **Title**, **Series**, or **Subject**, and **All Words**).
- The **Advanced** search allows patrons to choose the search type (e.g. **All Words**, **Authors**, or **Titles**) using drop-down menus, enter a search term, and then use Boolean operators to refine their search. Experienced users will typically use the **Advanced** interface for all of their searches.
- The **Study Program** interface is useful for those who want to look for titles belonging to a particular reading group or interest level. Enter a keyword, even if it's only the first few letters, click on the **Search** button, then select the terms you want from the results list.
- The **Explore** section (shown below) consists of a completely iconic interface that provides shortcuts to popular searches (**Most Popular**, **What's New**, **Award Winners**, etc.) and can be customized by the librarian for quick access to specific library resources. Of the five default icons, **Explore** is the only one that leads to another set of icons.



However, once a search has been performed, the main window transforms to provide the results of your latest search in a variety of configurable views along with a series of breadcrumbs or an explanation of why no search results were returned.

For more information on how to use the Researcher, including exhaustive documentation about its many features and attributes, please consult the "Researcher" sections of Alexandria's On-Line Help.

Step-by-Step: Setting Researcher Preferences

Researcher Preferences are used to establish how the Researcher functions. These preferences are necessary if you are planning on using the Researcher interface in your library.

Step 1. Select **Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Researcher** icon in the **Management** section of the **Preferences** window.

Step 3. In the **Search Modules** section on the left, select **Researcher**.

Step 4. On the **Researcher** tab; check or uncheck the boxes to define the privileges allowed to patrons when they access the Researcher. Make your choices thoughtfully to prevent any problems that may arise when patrons attempt to do things for which they are not allowed. For example, checking the **Offer Sounds Like Search** box will activate the **Sounds Like** search so that if a patron types "gost" and no search results are found, the patron will be asked if a **Sounds Like** search should be performed and, if it is, it will find all records with the word "ghost."

Step 5. COMPanion suggests that you only check **Require Login to Access Researcher** if you want viewing access limited to just your patrons.

Step 6. Using the **Researcher Timeout** drop-down menu, choose how long it takes for the Researcher to clear the information on the window and reset for a new search.

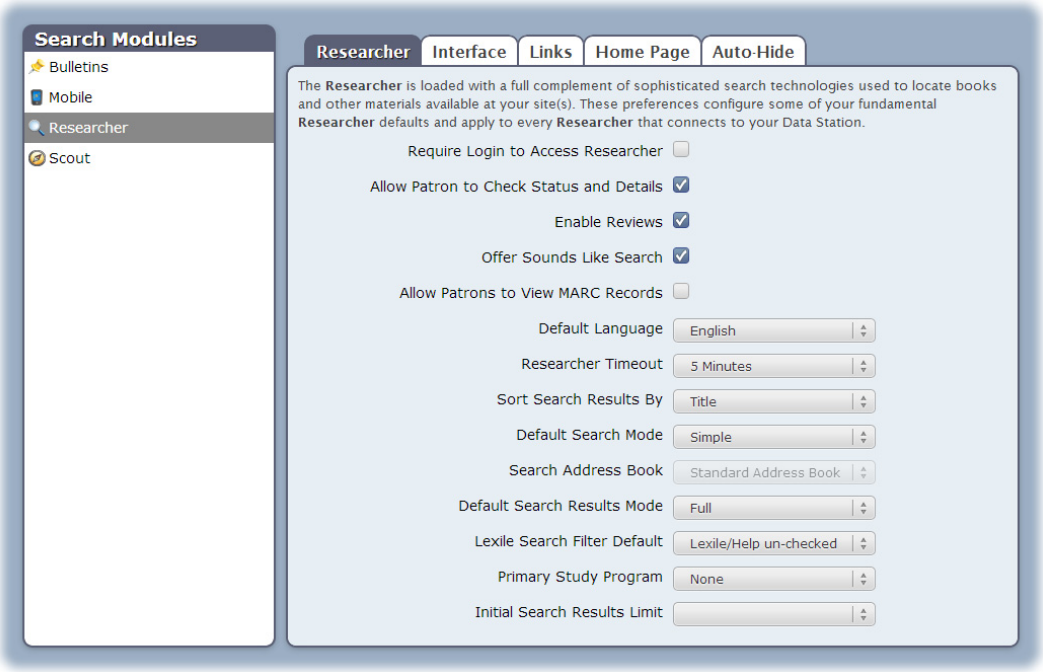
Step 7. Click on the **Interface** tab.

Step 8. Check or uncheck boxes to configure the interface (i.e. the options available to patrons when they access the Researcher). For example, if you're part of a Central Union but you wish availability to be limited to what is in your library, then don't check the **Allow Patrons to Search All Sites** box.

Step 9. When you are finished, click on **Save** in the upper-right corner of the window.

Researcher tab

These preferences configure your Researcher defaults and regulate the general access privileges extended to your patrons and/or operators using the Researcher interface. These preferences apply to *every* Researcher that connects to your hosted Data Station, therefore, make your selections thoughtfully to prevent any problems that may occur when patrons attempt to access or perform certain operations from the Researcher.



- NOTE-

Some of the areas controlled by these settings (e.g. **Reviews** or **Patron Information**) require patrons to first log into the Researcher using their patron barcode number and password, regardless of the **Require Login to Access Researcher** preference setting.

- **Require Login to Access Researcher—**When checked, access to the Researcher requires a valid patron **Username** and **Password**. When unchecked, your online catalog is open to the public via your hosted Data Station's IP address. Check this box if you don't want your collection searchable to the world.
- **Allow Patron to Check Status and Details—**When checked, a patron can access the Researcher's **Patron Information** window to view the status of items they have checked out, change their password, modify holds and reservations, and perform other minor actions (depending on their **Security Preferences**—certain patrons may be restricted from making changes). Those logged into the Researcher are only able to check their own status and details, not those of other patrons.

- **Enable Reviews—**When checked, patrons are allowed to review items in your collection and assign them ratings (ranging from *one-* to *five*-stars) by clicking on the rating stars located beneath the item cover art. When this preferences is *not* checked, the rating stars disappear—as does the ability to review items *(for more information on "Reviews", please consult Alexandria's Online Help)*.
- **Offer Sounds Like Search—**Check this box if you want the "**Perform a Sounds Like Search**" link to appear when a search returns no results; the link will remind the patron of the **Sounds Like** search, which sometimes finds matches when other searches do not. For example, if a patron enters "*gost*" and no title matches are found, the patron will be asked if a **Sounds Like** search should be performed and, if it is, it will find *all* records with the word "*ghost*."
- **Allow Patrons to View MARC Records—**When checked, the **View MARC Record** option appears beneath the **Other** section in the Researcher **Item Details** window. If the **View MARC Record** link is clicked, it will open a browser window containing a *text*-only version of the title record in MARC format.
- **Default Language for Researcher—**This preference allows you to set the default language used when the Researcher starts up or is refreshed (e.g. *English*, *Español*, *Français*). Initially, this is configured by your activation codes; in the United States, it's set to **English**. Keep in mind that this preference only affects Researchers; the **Language** setting found in the **Localization Preferences** affects all associated Librarian Workstations.
- **Researcher Timeout—**Select how long (in minutes) before the Researcher clears the current session information and resets the interface for a new search.
- **Sort Search Results By—**Select the default search results *sort order* for Researchers when you click on one of the following **Simple Search** picture icons: **Author**, **Title**, **Series**, or **Subject**, and **All Words**. You can choose to sort results by **Title**, **Author**, **Call Number**, **Awards**, **Medium**, **Series**, **Year**, or **Accession Date**. The **Smart Search** returns results ranked in relevancy order.
- **Default Search Mode—**Select the default search mode used by the Researcher; you can choose between **Simple** (default), **Advanced** (Boolean), **Study Program**, or **Home Page**. The **Simple** search is for those who don't have strong reading or writing skills; enter a search term and then click an optional picture icon to perform this search. If **Home Page** is selected, you will be directed to your custom or default **Home Page** and granted access to the Researcher through a search widget. For more information on these search types, please consult Alexandria's Online Help.
- **Search Address Book—**Select the default address book that will be used for Researchers; the default selection is always the **Standard Address Book**.
- **Default Search Results Mode—**Select the default search results *mode* that appears after a search has been successfully performed; you can choose between **Brief**, **Full** (default), and **Cover Art**. For more information on search result views, please consult Alexandria's Online Help.

- **Lexile Search Filter Default—**Use this drop-down menu to determine whether or not you'd like to provide **Lexile** search filters in the Researcher's **Filter** section:

  Lexile/Help un-checked—Allows patrons to use the **Help Me Find a Book** feature, but it is *not* checked by default.

  Lexile/Help checked—Allows patrons to use the **Help Me Find a Book** feature and by default, it is *checked*.

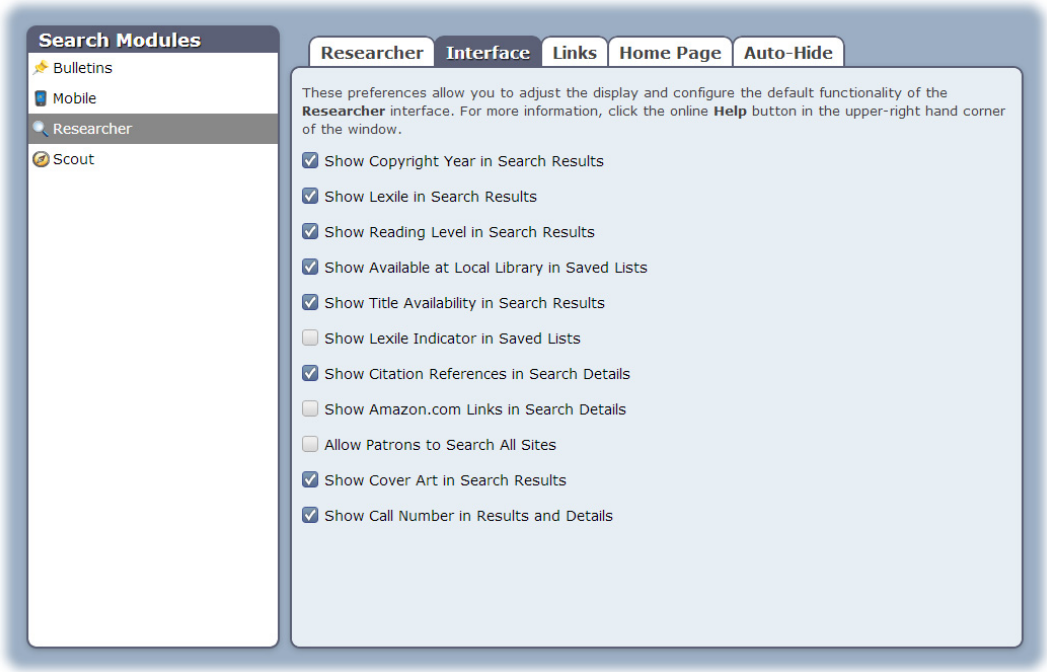
  Hide Lexile/Help—Make this selection if you *do not* wish to use the **Help Me Find a Book** feature; if you *don't* record personal Lexile measurements at your site, you may not want this feature to appear as it may confuse your patrons.

- **Primary Study Program—**The selection made from this drop-down menu affects (a) the default study program used in the Researcher's **Study Program** search, and (b) the reading level that is displayed in the search results window if the **Show Reading Level in Search Results** box is checked *(see "Interface tab" on page 156)*.

- **Initial Search Results Limit—**Choose the maximum number of initial search results to return: `25`, `50`, or `100`.

Interface tab

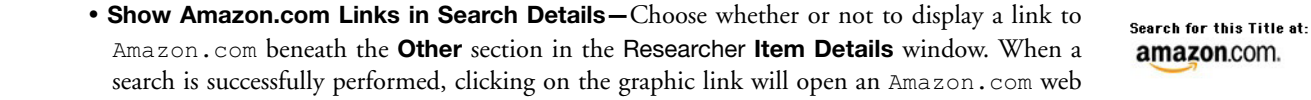
Use these preferences to lightly customize the Researcher interface; these preferences will be used as default for every Researcher that connects to your hosted Data Station.


Search Modules
Bulletins
Mobile
Researcher
Scout
Researcher
Interface
Links
Home Page
Auto-Hide
These preferences allow you to adjust the display and configure the default functionality of the Researcher interface. For more information, click the online Help button in the upper-right hand corner of the window.
Show Copyright Year in Search Results
Show Lexile in Search Results
Show Reading Level in Search Results
Show Available at Local Library in Saved Lists
Show Title Availability in Search Results
Show Lexile Indicator in Saved Lists
Show Citation References in Search Details
Show Amazon.com Links in Search Details
Allow Patrons to Search All Sites
Show Cover Art in Search Results
Show Call Number in Results and Details

Interface Settings

- **Show Copyright Year in Search Results—**When checked, the Researcher will include an item's copyright year (if available) in the search results window.
- **Show Lexile in Search Results—**When checked, the Researcher will include an item's **Lexile** information (taken from the `521` tag, if available) in the search results window.
- **Show Reading Level in Search Results—**When checked, an item's reading level information is displayed in the Researcher's search results window. The reading level value shown is determined by the study program selection made from the **Default Study Program** preference *(see "Researcher tab" on page 153)*. Your study program information *must* be entered correctly in the `521` (*Fountas & Pinnell*) or `526` tags (*Accelerated Reader* and *Reading Counts*); applicable study program information is generally stored in the `526_c` tag. Reading level information can be accessed and modified in the **Study Programs** subtab of the **Item Management** window. This preference will ignore Lexile information since *that* value is displayed independently, determined by the **Show Lexile in Search Results** preference (above).

- **Show Available at Local Library in Saved Lists—**When checked, the **Simple List** print format for saved lists in the Researcher will include the ampersat symbol ("**@**") to denote that the item is also available at a local library. This symbol will *not* appear if your **Public Library Cross Check** preferences are not configured correctly and the **Flag Items Also in Public Library** titles utility hasn't been performed.
- **Show Title Availability in Search Results—**When checked, the Researcher will show title **IN**/**OUT** availability in the search results list.
- **Show Lexile Indicator in Saved Lists—**When checked, a lexile indicator (e.g. **Lexile: 550**) will appear to the right of each title in Researcher saved lists, revealing whether it is above, equal to, or below, the current patron's **Lexile** measurement.
- **Show Citation References in Search Details—**When checked, an MLA-formatted **Citation** reference will appear in the Researcher **Item Details** window; this can be copied and pasted into other documents in order to create quick bibliographies.
- **Show Amazon.com Links in Search Details—**Choose whether or not to display a link to `Amazon.com` beneath the **Other** section in the Researcher **Item Details** window. When a search is successfully performed, clicking on the graphic link will open an `Amazon.com` web browser with the closest possible match.



- **Allow Patrons to Search All Sites—**Useful in a Central Union environment; if this box is checked, the Researcher will show available copies from all sites, not just those with a **Site ID Code** matching your own. Expressly, title availability won't just be limited to what you have available at *your* site. Otherwise, if left *unchecked*, only copies from *your* site will appear in your search results.
- **Show Cover Art in Search Results—**When checked, item cover art *(if available)* is included in the Researcher search results window; if the title record doesn't have its own cover art attached *(see "Cover Art tab" on page 127)*, the item's default medium image will be used instead. If this box is *not* checked, then attached cover art images will *never* be shown in the **Search Results** window.
- **Show Call Number in Search Results and Details—**When checked, a title's **Call Number** will appear in the Researcher's **Results** and **Details**.

Notes:

An Introduction to Importing

After successfully installing Alexandria and configuring your initial settings and preferences, your next step is to import your patrons and items.

There are times when you'll want to add information to Alexandria from outside sources (such as MARC records, book vendors, or patron information from a central database). The process of adding information into Alexandria from outside sources is called "importing".

Alexandria supports the importation of patrons, items, and transaction commands.

- WARNING -
Once an older version of an Alexandria data file has been imported or rebuilt in a newer version, it can *no longer* be downgraded. Therefore, it is *essential* to archive and backup your data prior to installing a new Alexandria upgrade.

Accessing the Online Data Import Window

Along with the **Circulation** "`/circulation`" and **Patron Management** "`/patrons`" windows, Alexandria's **Data Import** window can also be accessed over the web.

To access an online version of the **Data Import** window, type the IP address (or domain name) and port number of your hosted Data Station (e.g. "`123.456.78.910:80`") followed by "`/imports`" into your browser's **Address** field (usually located in the upper-left corner of the window).

If you are not sure what IP address (or domain name) your hosted Data Station uses:

- It appears in the **Transaction Log** of the main **Circulation** window each time your Librarian Workstation is launched; approximately three or four lines down.
- You can also locate your IP address under the **Network** header in the **System Info** subtab of the **Special** tab of the **Circulation** window.

If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact COMPanion's Technical Support team.

Computerized Records

Before continuing, it will help to understand some basic concepts about computerized records. In order to exchange information between different programs (or even between different operating systems), the information needs to be a format that many different programs can understand. The standard, called ASCII[1], is widely used to exchange information between different programs and operating systems. Sometimes an ASCII file is called a text file ("`*.txt`") because all it contains is textual information.

ASCII files contain two types of characters: *standard visible characters* such as numbers and letters of the alphabet, and *special characters* that are called **Control Characters**[2]. **Control Characters** are used to control the display or interpret the information in the file. If you have computerized data, you may be familiar with the `<tab>` and `<return>` control characters that are used to make text more legible.

When dealing with computer information systems, you often hear the terms *field*, *record*, and *file*. A *field* is the smallest unit of information stored. An example of a field is a book's title. A *record* is a related group of fields. Many records of the same type saved together are called a *file*. For example, in a *file* of names, a *record* consists of the *fields* "`First Name`" and "`Last Name`". A more complex file may include records with other fields such as "`Phone Number`" and "`Address`". In other words, *records* contain *fields* filled with information, and *files* contain many *records*.

In the library world, there is a fairly well-defined method of exchanging bibliographic information between computers. This format is called **MARC** (for **MA**chine-**R**eadable **C**ataloguing). Another format of MARC is called **MicroLIF** (for **Micro**computer **Site Information F**ormat). Alexandria has been programmed to recognize both MARC and MicroLIF files automatically during import. Alexandria can also export in both formats.

In addition to importing and exporting MARC and MicroLIF records, Alexandria is capable of importing and exporting files in a **tab-delimited** format. This format can be used to exchange information with other programs that utilize more complex MARC standards. Most database, spreadsheet, and word-processing programs on personal computers support files in a tab-delimited format.

1.American Standard Code for Information Interchange (ASCII).
2.Since **Tab** and **Return** characters aren't visible, they are represented in this guide as `<tab>` and `<return>`.

Tab-Delimited Records

A very common method of exchanging record information between programs is the tab-delimited ASCII file. In the tab-delimited format, fields are separated by the <tab> control character and the end of the record contains the <return> control character.

```
John <tab> Smith <return>
Bill <tab> Jones <return>
My First Name <tab> My Last Name <return>
```

For example, using tab-delimited patron import/export files, a school can transfer student information from the school information system into Alexandria (or transfer library information back to the school information system).

Alexandria's Tab-Delimited Import File Format

COMPanion has enhanced the tab-delimited format by adding special information to the first line of the file, used to interpret the data contained within. This first line is called a *header* because it's at the head (or beginning) of the file. The *header* allows COMPanion programs to figure out where the data in the file belongs. Alexandria *headers* look like this:

```
###*FileCode/FieldCode[1]/FieldCode/FieldCode/ <return>
```

The ###* doesn't mean anything, but is a rather unusual character combination, unlikely to be found at the beginning of any other files. If Alexandria discovers ###* at the beginning of a file, it assumes that the file is in a familiar format.

The header is optional. If it's present, Alexandria will automatically sort and organize the information and place it into the proper fields. If there is *no* header, Alexandria provides a **Field Mapping** window, which allows you to specify the order and type of data getting imported. A header is automatically created for all files exported from Alexandria.

Since the header is automatically created on export, the information can be easily transferred to other COMPanion software and instantly imported without an operator knowing *anything* about the file structure. In order to be consistent, Alexandria assumes that the first line of any import file is a header; however, it only knows how to process headers in the format stated above.

Some fields allow multiple lines of information (such as patron notes). Any <return> located in a field is converted to the '\' character on export; on import, the '\' character is restored to a <return>. Generally, you don't need to know this; however, if you were to examine an export file, you'd see these characters. Also, if you wanted to add a <return> into a file about to be imported, you can use the '\' character to make it happen.

1.The FieldCode numbers (shown above) don't have any special meaning other than acting as unique identifiers for each of the fields that can be imported or exported.

An Example of an Alexandria Import File

A sample patron import or export file might look like this:

```
###*PT01/1000/1007/1006/ <return>
1100000 <tab> Bill <tab> Smith <return>
1100001 <tab> John <tab> Jones <return>
```

In the example above, the header field codes "1000, 1007, 1006" specify that the fields are ordered by barcode, first name, and last name. An item record will be in a similar format, except that different field mapping codes are used and different types of field information are entered (e.g. the title or author of an item).

A simple way to study these formats is to export a few records, then examine the export file with your favorite text editing program.

If you export files from software suites (such as Microsoft Works), you'll notice that some may also place their own headers at the beginning of files. If you want, you can open your export file and replace the software suite header with a valid Alexandria header. If you don't do this manually, you'll have to make sure you select the correct fields in Alexandria's **Field Mapping** window.

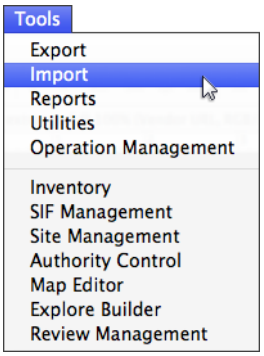
Importing Patrons & Operators

Imported patron and operator data can come from any source that provides a *text* file in a *tab-delimited* format; most word-processing and spreadsheet applications support files in tab-delimited format. In many cases, patron data is available in a machine-readable format from your school's office or from the district office. Check with your school or district office to find out how patron data is stored.

For example, when students graduate from elementary to middle school, you can receive new patron information from the administrative office school information system and import it into Alexandria.

Another use for export/import is to modify information in a group of records. Patron information can be exported, opened in another computer program, modified, then returned to Alexandria. Sometimes this is much easier than modifying records (one at a time) in Alexandria.

If you have a school information system that can export data on your students in a tab-delimited format, please review the **Patron Management** window *(page 271)* to determine what fields you wish to have included in the export.

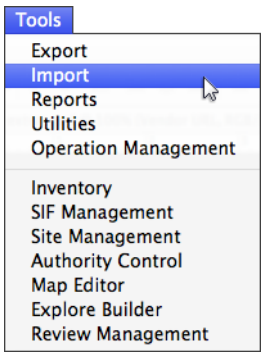


Rules for Importing Patron Information

When importing patron records, Alexandria first checks if barcode numbers and ID numbers are being imported. If they are, Alexandria makes sure these numbers are unique and not already in use by another patron.

- Alexandria looks for a header that contains a file designation of "PT01[1]" to specify patron information.
  ```
  ###*PT01/fieldcode/fieldcode.../ <return>
  ```
- During import, Alexandria attempts to locate an existing record that matches the newly imported record. If an existing Alexandria record is located (and the **Allow Patron Updates** box is checked in the **Patron Settings** tab of the **Data Import** window), the existing record is updated with the imported information. If **Allow Patron Updates** is *not* checked, matching import records are ignored (i.e. *not* imported). If no records in the system match, a new record is created.
- When looking for matching records, Alexandria first checks the patron barcode, then the community ID, then the government ID. If no matches exist, the import record is considered a new record. New records are assigned the **Starting Patron Barcode** and **Patron Policy** that you've specified in the **Data Import** window.
- Alexandria v6 *still* recognizes Alexandria v3 patron headers to support older version data transfers.

1.The file designator consists of two letters followed by two numbers. The letter will *never* be an "O" so you can be sure that "0" means zero.

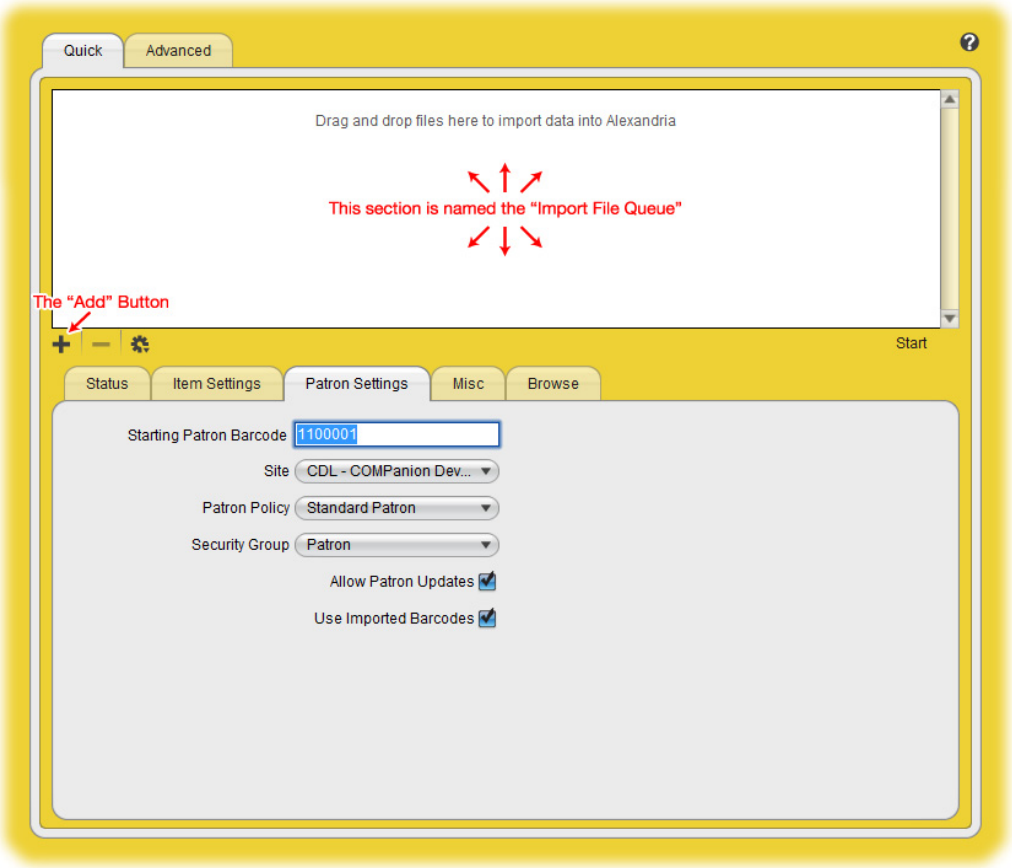


Step-by-Step: Importing Patron Records

To import patron records:

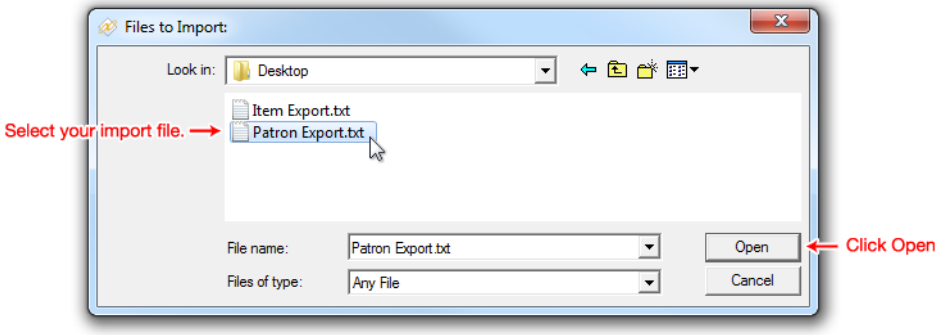
Step 1. Select **Tools** from Alexandria's main menu followed by **Import**.

Step 2. The **Data Import** window will appear.

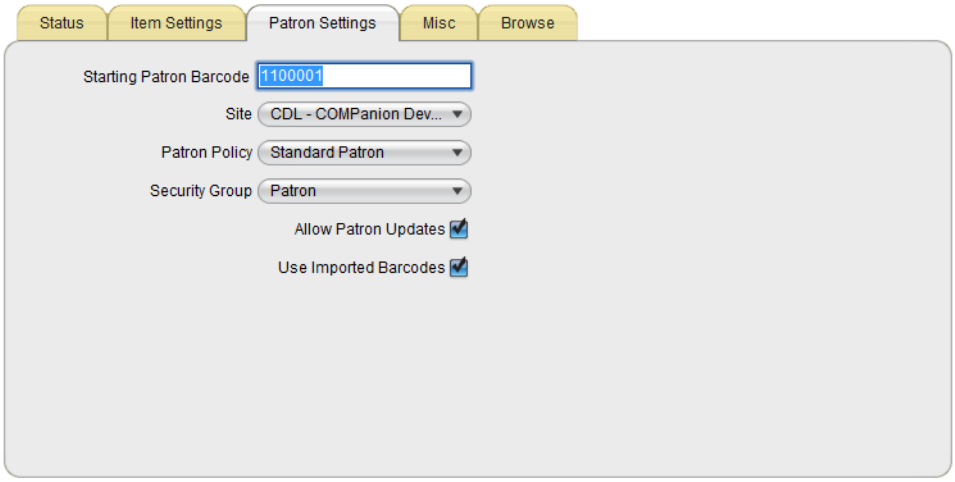


Step 3. Click the **Add** ("**+**") button, located at the bottom-left of the **Quick** tab pane; this allows you to place one (or more) import files into the import queue.

Step 4. Use your operating system standard explorer window to locate and select the file you want to add to the import queue. Once the file has been highlighted, click **Open** to add it to the list. You may also add patron import files by dragging and dropping them into the import file queue.



Step 5. Click on the **Patron Settings** tab; these settings determine what changes are made to a patron record file upon import.



- NOTE -

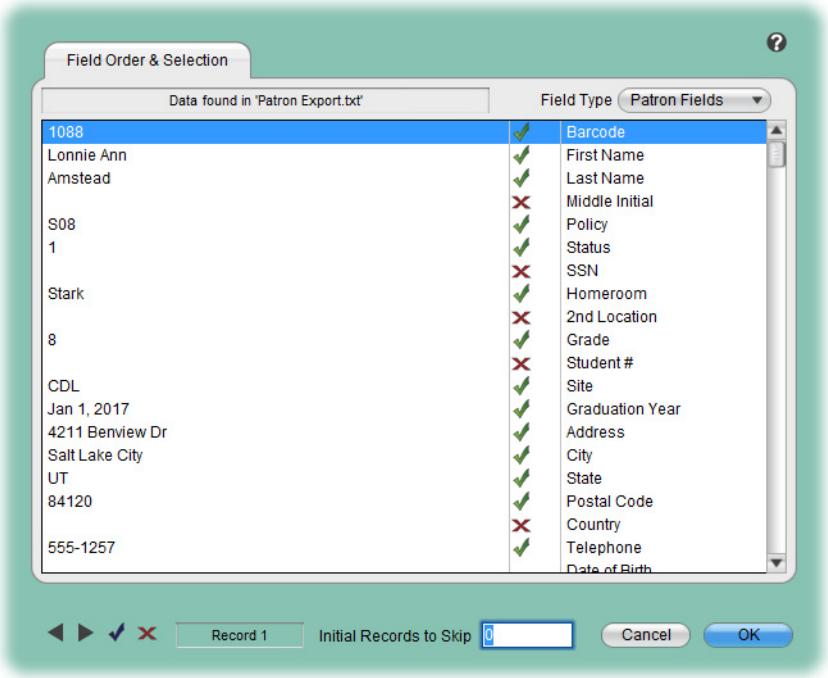
During import, if Alexandria detects a patron barcode number that is less than *three* alphanumeric digits, it will take the **Next Patron Barcode** specified in the **Patron Defaults** tab of your **Patrons Preferences** *(page 113)* and assigns that barcode number to the patron being imported.

Patron Settings tab

- **Starting Patron Barcode**—When a new patron barcode number is required, Alexandria will assign numbers starting with *this* value. Alexandria always checks to see if a barcode is already in use, and if it is, a new number will be automatically selected.
- **Site**—If the patron you're importing doesn't have a designated school in their import file, this field will apply a **Site ID** to their patron record.
- **Patron Policy**—If the patron you're importing doesn't have a policy defined in their import file, *this* policy will be assigned by default. Default is **Standard Patron**.
- **Allow Patron Updates**—When this box is checked, new import data can be used to update existing patron records if certain key fields match. When this box is *not* checked, matching is ignored and only new records are added.
- **Use Imported Barcodes**—When this box is checked, barcode numbers found in imported records are taken *as is* during import. When this option is *not* checked, all barcodes are reassigned using the **Starting Patron Barcode** number (above).

Step 6. Click **Start** to begin the patron import. If the patron import file is recognized, Alexandria will automatically match and reassign information to the proper fields.

Step 7. If the patron import file is *not* recognized, Alexandria will ask you to specify the type of data getting imported. Choose **Patron**. From the **Field Mapping** window that appears, you may realign data in the patron import file to match specific Alexandria fields.



Use the **Field Type** drop-down menu to specify **Patron Fields**. The data from the import file is shown on the left of the window. Alexandria field names are shown on the right-hand side.

Use the left/right arrow buttons in the bottom-corner of the window to advance to the next (or previous) record in the import file. If you want to skip some of the first records in the import file, you can specify an **Initial Records to Skip** value. Default is "0".

To readjust the field order, highlight (select) and drag the field names. Align the Alexandria **Field Types** with information in your imported data. To ignore a field, double-click on it to change the green checkmark to a large, red "X". This means that the data for this field is ignored and will *not* be imported.

Step 8. Continue to match the **Field Types** with the information in your file. Once the field order has been established, click the **OK** button to import the data.

Step 9. The import will be sent to the **Operation Management** window which automatically orders/sorts all pending operations (i.e. reports, utilities, imports, or exports) and allows you to track the progress of the current operation.

Step 10. An operation that is currently running in the **Operation Management** window provides a **Cancel** option; click **Cancel** to stop the import.

- NOTE -

Special note should be made of the **Full Patron Name** field during a **Patron** data import. If you have patrons with a combined first and last names (one that has not been separated by tab delimination), use this field to split the name into **First** and **Last Name** during import.

Patron Fields by Field Number

Barcode	1000	
Community ID Code	1001	
Government ID Code	1002	
Password	1003	
Location	1004	
2nd Location	1005	
Last Name	1006	
First Name,	1007	
Middle Name / Middle Initial	1008	
Level	1010	
Address	1011	
City	1012	
State	1013	
Postal Code	1014	
Country	1016	
Phone Number	1017	
Fax	1018	
Email	1019	
Contact Notes	1020	
General Notes	1021	
Alert Notes	1022	
Categories	1025	Separate category terms with \
Status	1026	1=Active, 2=Card Lost, 3=Usage Blocked, 4=Transferred, 5=Inactive, 6=Other
Library Code	1027	For multi-collection databases
Policy	1028	Uses policy short code
Previous Policy	1029	Uses policy short code
Total Fines	1030	**Export Only*
Total Payments	1031	**Export Only*
Sex (Gender)	1032	Unknown=0 or U, Male=1 or M, Female=2 or F
Life-to-Date Usage Count	1033	**Export Only*
Number of items currently checked out	1034	**Export Only*

Life-to-Date Overdue Count	1035	**Export Only*
Number of items currently overdue	1036	**Export Only*
Number of items currently on hold	1037	**Export Only*
Current Reservations Count	1038	**Export Only*
In Stock Holds Count	1039	**Export Only*
Reserves Count	1040	**Export Only*
Keep Patron History	1041	Yes or No
Last Use Date	1042	**Export Only*
Last Validation Date	1043	**Export Only*
Next Validation Date	1044	**Export Only*
Birthdate	1045	
Patron Accession Date	1046	
Card Expiration Date	1047	
Optional Date	1048	
Additional Contact (Parent/Guardian)	1049	
3rd Location (Institution, Site, or School)	1050	
Lexile Number	1051	
User Name	1052	
Lexile Table	1060	All grades contained in single string, cells separated by || and rows by //
Credits	1061	**Export Only*
Unaccepted Credits	1062	**Export Only*
Patron RSN	1099	**Export Only*
In Transit Hold Count	1100	**Export Only*
Patron SIF Info	1200	**Export Only*
Patron SIF Info 2	1201	**Export Only*
Patron Barcode	3000	**Fine Information*
Patron Name	3001	**Fine Information*
Type	3002	**Fine Information*
Description	3003	**Fine Information*
Total	3004	**Fine Information*
Balance	3005	**Fine Information*

Notes:

Importing Items

Alexandria can import item information in industry-standard MARC or MicroLIF format (also in *tab-delimited* format). Most word-processing or spreadsheet applications support files in tab-delimited format.

The process of taking existing catalog information (sometimes even on catalog cards) and converting the information into a machine-readable format is called retrospective conversion. This process takes time and effort. If you have an existing collection, now is a good time to examine your collection and remove unused and outdated items.

There are several methods of converting your data for Alexandria.

- **Retrospective Conversion:**
  You can hire a retrospective conversion company to create MicroLIF and MARC records for all items in your collection.

  Before sending your shelf list to the conversion company, assign barcode numbers to all the assets in your collection and record the barcode and other local information on the catalog cards. The MARC records you receive and import into Alexandria will be complete, and you will have no additional data to enter.

  This process can be time-consuming and expensive, but it is the most complete retrospective conversion method available.

- **Title Assistant:**
  Alexandria's integrated **Title Assistant** can access hundreds of Z39.50 collections using a standard internet connection. You input minimal information (e.g. title, author, ISBN and/or LCCN) and then Title Assistant searches the internet for MARC records matching that information.

  Once the process is complete, you can add local information such as call number (tag **852_h**), barcode number (tag **852_p**), price (tag **852_9**), special funds (tag **852_1**), and volume (tag **092_v**) to your MARC records.

  This process can save many hours of retrospective conversion. If you plan to do your own retrospective conversion, this is the best alternative. The Z39.50 collections searched can be configured in your **Address Books Preferences** *(page 73)*.

- **Import item records into Alexandria from an outside source:**
  You can import information into Alexandria using any software that can create a *text* file in a tab-delimited format.

- **Manually enter the information into Alexandria:**
  This direct approach is *much* more time-consuming, but moderately more cost-effective.

Most book vendors offer MARC/MicroLIF records on file or CD-ROM for the items they sell. Conveniently, Alexandria can read MARC or MicroLIF records directly, saving you the time and energy of typing item information directly into the computer. If you are automating a new library, ask for these records each time you order new items.

Rules for Importing Item Information

Importing items is remarkably similar to importing patrons. When importing item records, Alexandria first determines if it's a new item record or an existing item record that needs updating.

- Alexandria looks for a header that contains a file designation of "FT01[1]" to specify item information.
  ###*FT01/fieldcode/fieldcode.../ <return>
- During import, Alexandria attempts to locate an existing record that matches the new import record. If an existing record is located (and the **Allow Title Updates** box is checked in the **Item Settings** tab of the **Data Import** window), the existing record is updated using the imported information. If **Allow Title Updates** is *not* checked, Alexandria will *not* attempt to match records from the import file. If no records in the system match, a new record is added.
- When looking for matching records, Alexandria first checks the copy barcode, then the ISBN, and LCCN. If Alexandria finds an *exact* match for the barcode, ISBN, or LCCN, then the existing (i.e. matching) record is updated. If the previous check fails, Alexandria then looks for a matching title, author, medium, call number, publication year, publisher, extent and volume—if an existing item record matches, it's updated with the new import information.
- If the updated or newly imported record is MicroLIF or MARC and doesn't contain copy information, a new copy will be added to the record if **Always Add Copies** is selected in your **Item Import Settings**.

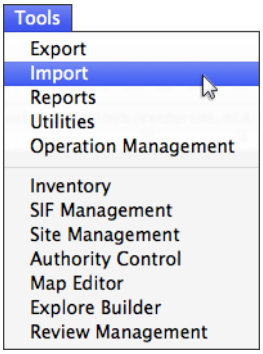
Alexandria analyses each and every imported MARC record to ensure that information is correctly integrated—no matter the source or vendor. If you discover records that don't import correctly, send them to COMPanion and we'll be sure to enhance Alexandria to import them properly.

Alexandria correctly imports records from the following sources:

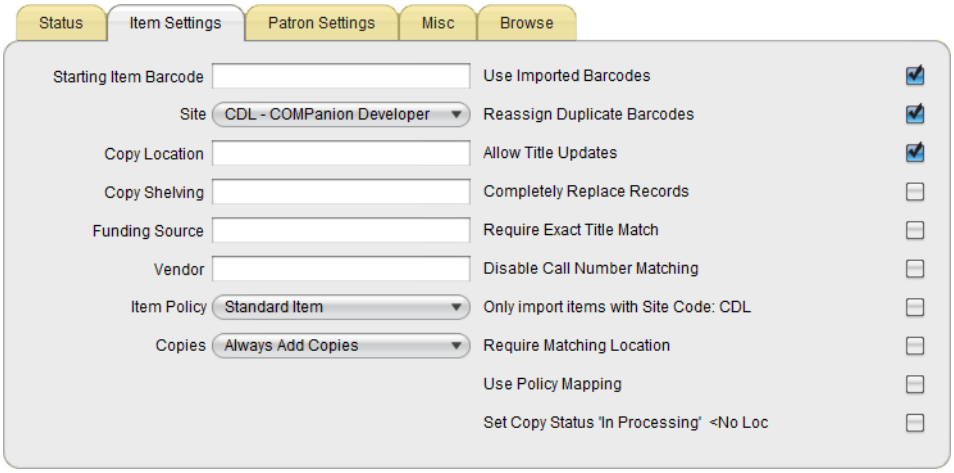
US MARC Communication & MARC 21
1987 MicroLIF
1991 MicroLIF
Canadian MARC
Dynix, Follett
...and many others since the printing of this document[2].

1.The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero.
2. Others such as **SunLink**; Florida's K-12 public school union catalog, **WisCAT**; Wisconsin's resource sharing system, **Laser Cat**; Western Library Network's (WLN) CD-ROM database of four million USMARC cataloging records, and **WorldCat**; Online Computer Library Center's (OCLC) the world's largest online public access catalog.

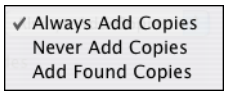
Item Settings tab



The **Item Settings** tab (in both **Quick** and **Advanced** mode) of the **Data Import** window allow you to specify information about the items that you are importing into your database. This covers the features of both the **Quick** *and* **Advanced** versions of the **Item Settings** tab, although some options may appear in one and not the other (e.g. **Select Fields** and **Set Copy Status 'In Processing'**).



- **Starting Item Barcode**—When a new item barcode number is required, Alexandria will assign numbers starting with *this* value. Alexandria always checks to see if a barcode is currently in use, and if it is, a new barcode number will be automatically selected.
- **Site**—If the collection code for the record you're importing isn't specified in the import file, this collection value is assigned to the **852_a** tag.
- **Copy Location**—If the location code for the record you're importing isn't specified in the import file, this value will be assigned to the **852_b** tag. The **Copy Location** term is controlled in the **Terminology** tab of your **Localization Preferences** *(page 93)*.
- **Copy Shelving**—If the shelving location for the record you're importing isn't specified in the import file, this value will be applied to the **852_c** tag. The **Shelving Location** (i.e. **Copy Shelving**) term is controlled in the **Terminology** tab of your **Localization Preferences** *(page 92)*.
- **Funding Source**—If the funding source for the record you're importing isn't specified in the import file, this value will be applied to the **852_1** tag under a specially-formatted subfield.
- **Vendor**—If the vendor code for the record you're importing isn't specified in the import file, this value will be applied to the **852_1** tag under a specially-formatted subfield.
- **Item Policy**—If the item you're importing doesn't have a policy defined in the import file, *this* policy will be assigned as the default. Default is **Standard Item**.



- **Copies—**This selection determines how copies are managed during import. Default is **Always Add Copies**.

  Always Add Copies—During import, if the record being imported doesn't contain any copies, then a new copy will be added to the title record even if Alexandria already has a matching title with a copy.

  Never Add Copies—Copies contained in import files are essentially ignored; only title information will be imported and/or updated.

  Add Found Copies—If you're allowing title updates and a match is made, copies will be added or updated as appropriate. If you're *not* allowing title updates, this selection simply adds a new title for *every* record imported and adds all copies that are included in the import record (essentially, there is no matching; any barcodes that are duplicates of barcodes that currently exist within your Alexandria database will be reassigned).

- **Use Imported Barcodes—**When this box is checked, barcode numbers found in imported record are taken *as is* during import. When this option is *not* checked, all item barcodes are reassigned using the **Starting Item Barcode** number (detailed on the previous page).

  If you know for sure that your vendor assigned "dummy" barcode numbers to your MARC records, you'll want to turn this option "`off`" to force Alexandria to assign new barcode numbers that comply with your numbering strategy.

- **Reassign Duplicate Barcodes—**When checked, any barcode numbers that match barcode numbers that currently exist within your Alexandria database will be reassigned using the **Starting Item Barcode** number (detailed on the previous page).

- **Allow Title Updates—**When checked, imported data will update existing titles if specific key fields match (e.g. barcode, ISBN, LCCN, title, author, and more). A non-repeating tag in the import file will completely replace what currently exists in your data; new tags will be added to the data for repeating tags. When this option is *not* checked, only new records will be added.

  Typically, you'll want Alexandria to add new copies to existing titles, or use import files to update brief records. If, however, you want Alexandria to create a new title record for each MARC record you import, uncheck this option.

  On—If title or copy data is matched during import, the existing title records are modified (that can mean adding copies or updating copy *and* title info).

  Off—If selected, existing title records are *never* modified by import. If a barcode being imported matches an existing one, it is reassigned. Title records are added—copies may (or may not be) added.

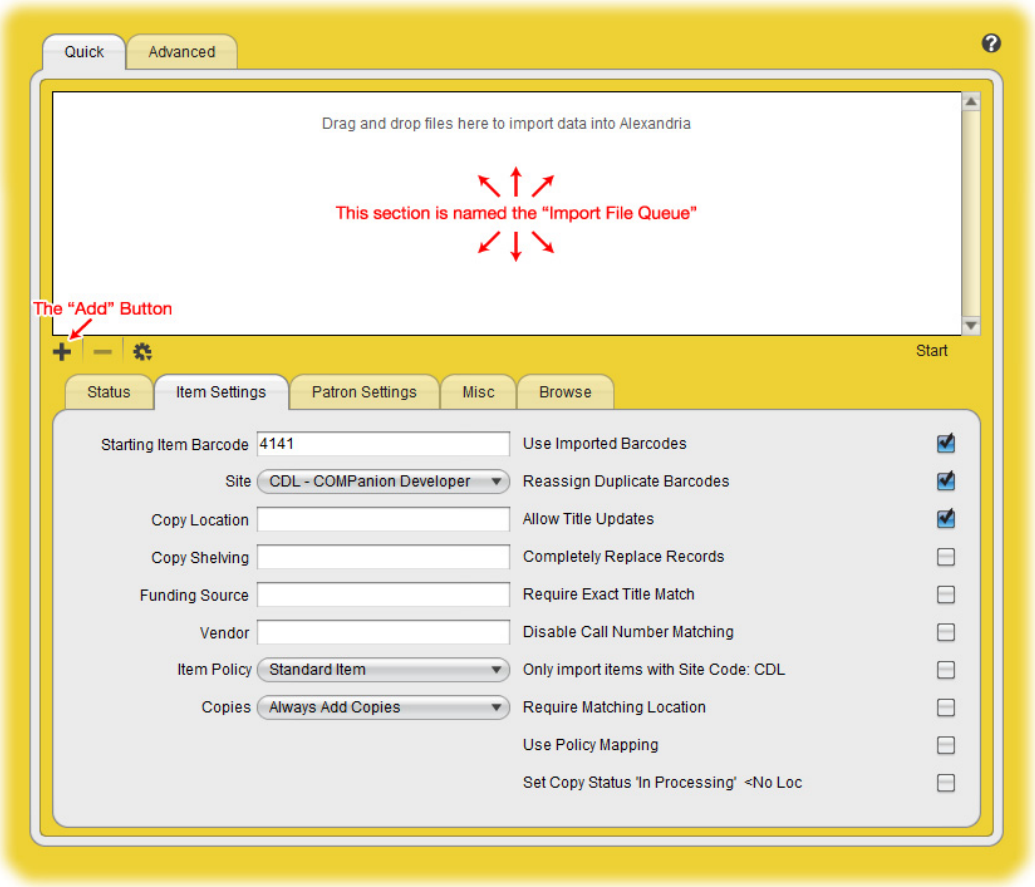
- **Completely Replace Records—**When selected, the tags in MARC records less than (or equal to) `839` will be completely replaced.
- **Require Exact Title Match—**When checked, existing titles in the database will only be updated when there is an *exact* title match. When unchecked, a close match is acceptable, allowing for differences in cataloging with or without leading articles and other slight variances.
- **Disable Call Number Matching—**When checking for matching titles on import, an item's **Call Number** is taken into consideration; for those who require it, this option disables that behavior. In most cases, COMPanion recommends leaving the call number matching criteria enabled *(default)*. Central Union databases that are not utilizing title call numbers (due to differences in shelving between branch locations) may want to disable this option to avoid the creation of duplicate title records that vary only by call number.
- **Only Import Items With Site Code: {{YOUR SITE CODE HERE}}—**When checked, copy data is ignored where the `852_a` site code doesn't match the current library identification code specified in the **Site Management** window. When there is no `852_a` information, it is assumed to be the local collection code. When unchecked, all copies are imported—no matter what the `852_a` tag contains.
- **Require Matching Location—**When this box is checked, only copy information with your union's **Site ID** code (or no location code) is imported. All other library codes are ignored.
- **Use Policy Mapping—**When checked, any call numbers within the call number range specified in your **Policies Preferences** window will be assigned to that particular item policy. Please review the **Policies** and **Call Number Mapping** preference sections for more information *(page 100)*.
- **Set Copy Status 'In Processing'** (**Quick** tab only)**—**There are times when items are imported into Alexandria, but they are not ready for the shelf. For example, sites that purchase MARC records from a vendor need to be imported before your operators can finish processing the books. Checking the **Set Copy Status 'In Processing'** box allows you to change the copy status of all items being imported from **Available** to **In Processing**. Later, you can run a utility to automatically change the copy of the items to **Available**.

Step-by-Step: Importing Item Records

Item records in MARC, MicroLIF, or tab-delimited format may be imported into Alexandria.

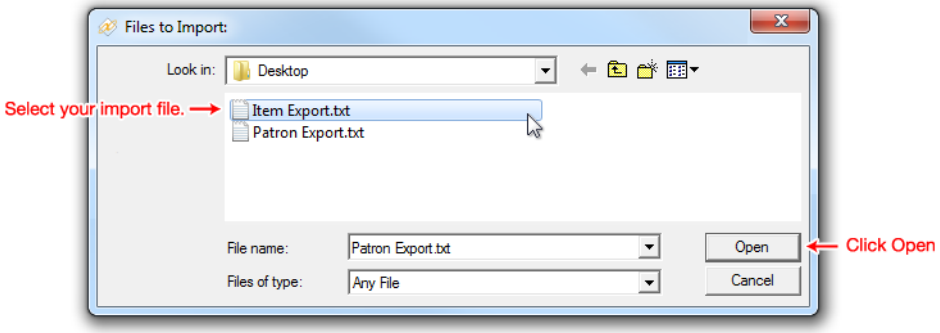
Step 1. Select **Tools** from Alexandria's main menu, followed by **Import**.

Step 2. The **Data Import** window will appear.



Step 3. Click the **Add** ("**+**") button, located at the bottom-left corner of the **Quick** tab pane; this allows you to place one (or more) import files into the import queue.

Step 4. Use your operating system standard explorer window to locate and select the file you want to add to the import queue. Once the file has been selected, click **Open** to add it to the list. You may also add item import files by dragging-and-dropping them into the import field queue.



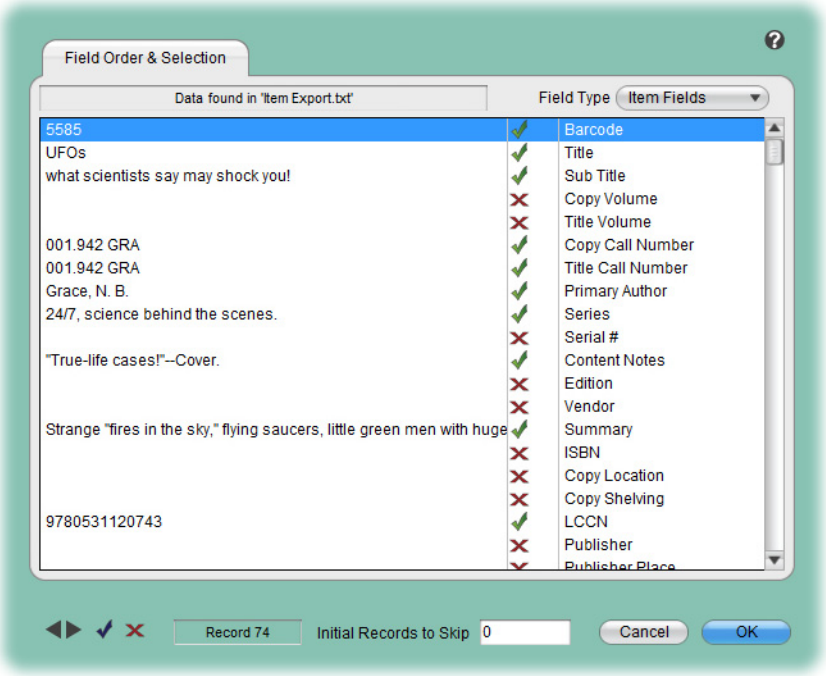
Step 5. Click on the **Item Settings** tab; these settings determine what changes are made to a item record upon file import.

- NOTE -
During import, if Alexandria detects an item barcode number that is less than *three* alphanumeric digits, it will pad the beginning of the barcode using X. For example, if you are importing an item with the barcode of "7", then Alexandria will automatically import it as "XX7".

Step 6. Click the **Start** button to begin the item import. If the item import file is recognized, Alexandria will automatically match and organize the information into the proper fields.

Step 7. If the item import file is *not* recognized, Alexandria will ask you to specify the type of data getting imported. Choose **Item**.

Step 8. From the **Field Mapping** window that appears, you may realign data in the item import file to match specific Alexandria fields.



Use the **Field Type** drop-down menu to specify **Item Fields**. The data from the import file is shown on the left of the window. Alexandria field names are shown on the right-hand side.

Use the left/right arrow buttons in the bottom-corner of the window to advance to the next (or previous) record in the import file. If you want to skip some of the first records in the import file, you can specify an **Initial Records to Skip** value. Default is "0".

To readjust the field order, highlight (select) and drag the field names. Align the Alexandria **Field Types** with information in your imported data. To ignore a field, double-click on it to change the green checkmark to a large, red "X". This means that the data for this field is ignored and will *not* be imported.

Step 9. Continue to match the **Field Types** with the information in your file. Once the field order has been established, click the **OK** button to import the data.

Step 10. The import will be sent to the **Operation Management** window which automatically orders/sorts all pending operations (i.e. reports, utilities, imports, or exports) and allows you to track the progress of the current operation.

Step 11. An operation that is currently running in the **Operation Management** window provides a **Cancel** option; click **Cancel** to stop the import.

Item Fields by Field Number

Barcode	2000	852_p
Copy Last Used Date	2001	**Export Only*
Copy Check Out Count	2002	**Export Only*
Copy Days in Circulation	2003	**Export Only*
Copy Last Modified Date	2004	**Export Only*
Prior Patron Barcode	2005	**Export Only*
Previous Prior Barcode	2006	**Export Only*
Before Previous Patron Barcode	2007	**Export Only*
Inventory Date	2008	852_1
Accession Date	2009	852_1
LCCN	2010	010_a
Replacement Cost	2011	
Purchase Cost	2012	852_9
Current Policy	2013	
Previous Policy	2014	**Export Only*
Copy Status	2015	**Export Only*
Vendor	2016	852_1
Copy Condition	2017	852_1
Copy Notes	2018	852_x
Copy Alert	2019	852_z
ISBN	2020	020_a
Copy Number	2021	852_t
Funding Source	2022	
Copy Collection	2023	852_a
Copy Location	2024	852_b
Copy Call Number	2025	852_h
Copy/Title Volume	2026	852_v
Shelving Field	2027	
Bibliographic Codes/Keywords	2040	Separated by \

Curriculum Keywords	2041	Separated by \
Don't Show in Alexandria Researcher	2042	Yes or No
Copy Count	2043	**Export Only*
Available for Checkout	2044	**Export Only*
Title Life-to-Date Usage Count	2045	**Export Only*
SmartMARC Matching Score	2046	**Export Only*
Title Accession Date	2047	**Export Only*
First Use Date	2048	**Export Only*
Last Use Date	2049	**Export Only*
Last Modified Date	2050	**Export Only*
Last Modified User ID	2051	**Export Only*
Title Current Policy	2052	**Export Only*
Title Previous Policy Short Code	2053	**Export Only*
Last Validation Date	2054	**Export Only*
Checked Out To	2055	**Export Only*
Title Call Number	2063	
Copy Volume	2064	
Title RSN	2099	**Export Only*
Primary Author	2100	From: 100_a
Full Title	2240	Title: Subtitle—*Export Only*
Title	2245	245_a
Subtitle	2246	245_b
Statement of Responsibility	2247	245_c
Medium	2248	245_h
Edition	2250	250_a
Publisher Place	2260	260_a
Publisher	2261	260_b
Publisher Year	2262	260_c
Extent	2300	Full description—*Export Only*
Physical Description	2301	300_a
Other Physical Details	2302	300_b
Dimensions	2303	300_c

Accompanying Material	2304	300_e
Series Title	2440	830
Serial Number	2441	
General Note	2500	500_a
Content Note	2501	
Summary	2520	520_a
Target Audience Note	2521	521_a
Review Source	2522	521_b
Before Previous Patron Barcode 2	2600	**Export Only*
Before Previous Patron Barcode 3	2601	**Export Only*
First Subject	2651	650_a--650_x--650_y--650_z
URL	2530	
URL Description	2531	
Second Subject	2652	650_a--650_x--650_y--650_z
Third Subject	2653	650_a--650_x--650_y--650_z
Fourth Subject	2654	650_a--650_x--650_y--650_z
Fifth Subject	2655	650_a--650_x--650_y--650_z
Author List	2700	**Export Only*
Study Program Name	2750	
Study Program Interest Code	2751	
Study Program Reading Level	2752	
Study Program Point Count	2753	
Study Program Test Number	2754	
Study Program Holding Code	2755	
Last Library	2756	**Export Only*
Lexile	2757	
Lexile Code	2758	

Notes:

Getting Started With Reports

Alexandria® Hosted Service

An Introduction to Reports

The **Reports** window allows you to create a nearly endless variety of reports. *You* choose the information you want to include and how it's arranged and organized; *you* write the report!

Essentially, this window provides general templates that help you build reports that meet the form, content, and organizational requirements for your department, school, or district. Once you've created your own custom reports, you won't often need to adjust the particulars.

Each report can output "*.pdf*" or "*.vwp*" documents that provide detailed and contextually relevant information about account and financial activity, and more—all the way down to the granular transaction level.

The following chapter provides a brief overview of the **Reports** window and then guides you through the step-by-step process of creating a report.

The Reports Window In More Detail

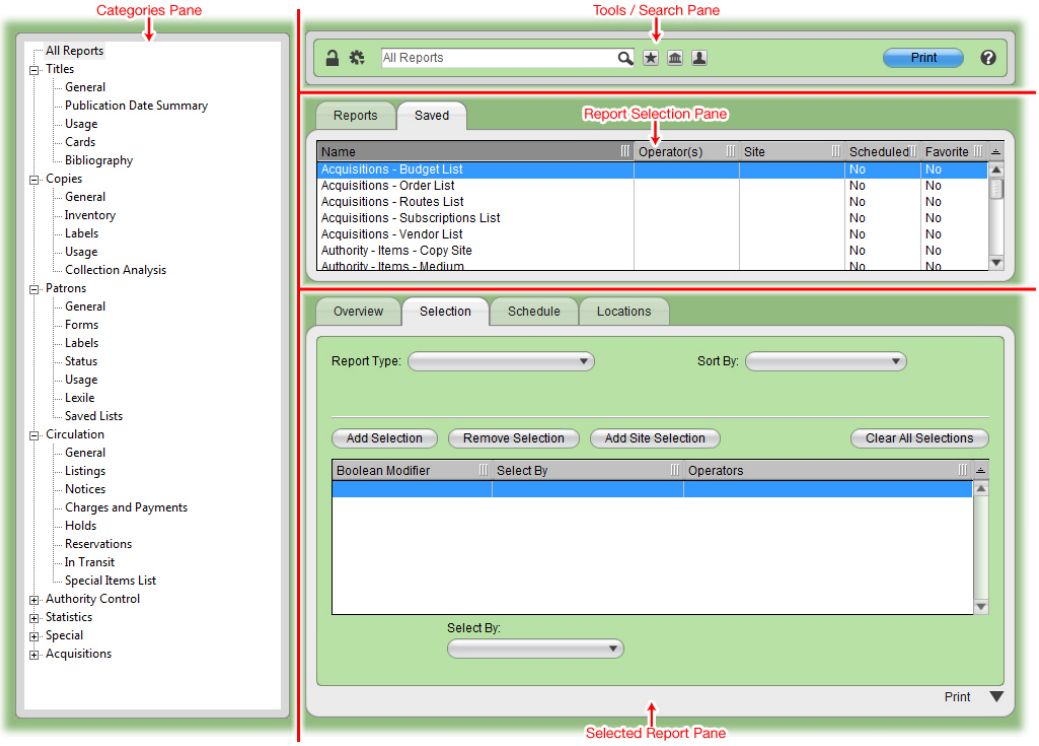
At first glance, faced with an abundance of tabs and large fields crammed with lists of names, the **Reports** window may seem overwhelming. *Don't panic!* Although it may look complicated, the **Reports** interface was designed with simplicity in mind; placing everything in a single, easily navigable window that allows you to quickly find, modify, create, and print reports.

Additionally, the **Reports** window allows you to customize reports to only include pertinent information: records of interest, transaction types, balance selections, and personalized text on circulation notices. You can also schedule reports and deliver their output via email, FTP, etc.

In order to become a report wizard, there are only *three* essential things you need to understand: category searching, report templates, and creating custom reports.

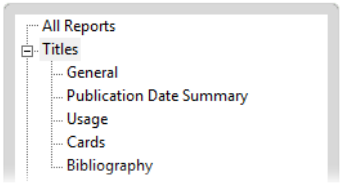
The **Reports** window was developed using the familiar three-panel layout found in many of Alexandria's management interfaces.

- The left-hand side of the window is comprised of the **Categories** pane, containing an organized list of all existing report categories (e.g. **Titles**) and subcategories (e.g. **Publication Date Summary**). Selections from this pane act as filters, allowing you to narrow your options and display only relevant reports.
- The top-right section of the window contains the **Tools/Search** pane along with the **Report Selection** pane (i.e. the **Reports** and **Saved** tabs), which allows you to select the specific report you would like to view, modify, or print.
- The **Selected Report** pane—the bottom-right area of the window—contains options for the highlighted (i.e. selected) report, spread throughout the following tabs: **Overview**, **Selection**, **Sites** *(Distributed Union only)*, **Schedule**, and **Locations**.



Report Categories Pane

The first step in producing meaningful reports is picking the proper report category. The report **Categories** pane on the left-hand side of the window is a collection of categories and subcategories that can reduce the number of options that appear in the **Report Selection** pane (i.e. the **Reports** and **Saved** tabs) on the right. You are able to expand or contract associated subcategory sections by clicking on the associated icon located to the left of the main category name. Selecting (highlighting) one of the main category (or subcategory) names (e.g. **Titles**) will reveal all of the reports available for that category (or subcategory). For example, if you want to print a **Charges and Overdue Fines** report, you can't do it with the **Patrons** category selected—it's a **Circulation** (category) report that you'll find under the **Charges and Payments** or **Listings** subcategories. Selecting the **All Reports** selection at the top of the categories list will populate the **Reports** and **Saved** tabs with *all* available report options.



The **Search** bar (described on the following page) works in conjunction with the report **Categories** pane. In some ways, the **Search** bar is the ultimate report filter—usurping the **Categories** pane; you may find yourself completely ignoring the report **Categories** filters, preferring to use the **Search** bar instead.

The **Search** bar is used to further reduce the number of options shown in the **Reports** and **Saved** tabs. For example, if you have the **All Reports** category selected from the report **Categories** pane and then type "budget" in the **Search** bar, you will only see reports related to budgets in the **Reports** and/or **Saved** tabs.

Reports Tools / Search Pane

The second half of the **Reports** window is largely dedicated to the currently selected report (filtered using the **Categories** pane on the left), which contains all of the reports configurable options and editable fields.

Topping this section of the window is a long, rectangular area containing the **Save All** and **Revert All** buttons[1], the **Print** button, the **Online Help** icon, the **Lock/Unlock** icon and the primary **Actions** icon which performs functions related to the selected report.

Unlock/Lock Icon—When the **Reports** window is opened, the default state of the **Saved** tab is "locked". When locked, **Saved** reports can be viewed and printed, but modification to any of the report settings is disabled until unlocked. Clicking the lock icon unlocks the **Saved** tab; it remains unlocked until you click the lock icon again or the window is closed.

Actions—The gear/cog menu contains report-specific functions and other tools; the options available in the **Actions** menu differ based on whether the **Reports** or **Saved** tab is selected.

- **Lock/Unlock Report** (Cmnd/Ctrl+U)—The lock icon only appears in the **Reports Tools / Search** pane when the **Saved** tab is selected and prevents an operator from making any changes to the currently selected report. When the **Saved** tab is locked, reports may still be viewed and printed, but modification of any of the report settings are disabled until the report is unlocked. The **Saved** tab will remain unlocked until an operator selects **Lock/Unlock Report** (Cmnd/Ctrl+U) again or the window is closed.
- **Save Report** (Cmnd/Ctrl+S)—Saves only the currently selected (i.e. highlighted) **Saved** report.
- **Create New Saved Report / Duplicate** (Cmnd/Ctrl+D)—Duplicates the currently selected report and asks that you provide a new name; available in both **Reports** and **Saved** tabs.
- **Save All Reports** (Cmnd/Ctrl+Alt/Option+S)—Saves *all* changes made to multiple **Saved** reports in the **Reports** window; this option only appears when changes have been made to the selected—or any formerly selected—report in the **Saved** tab.
- **Revert Report**—Reverts only the currently selected (i.e. highlighted) **Saved** report.
- **Revert All**—Reverts *all* changes made to multiple **Saved** reports in the **Reports** window; this option only appears when changes have been made to the selected—or any formerly selected—report in the **Saved** tab.
- **Add to/Remove From Favorites**—This option will "favorite" or "un-favorite" the selected report in the **Saved** tab; essentially, checking or un-checking the **Favorite** box in the **Overview** tab for the selected report.

1.The **Save All** and **Revert All** buttons are conditional and *only* appear when changes have been made to various fields of a report selected from the **Saved** tab.

- **Delete Selected Report** (Cmnd/Ctrl+R)—This selection completely removes the selected report from the **Saved** tab. This can *not* be undone, so think twice before making this selection.
- **Delete All Reports Shown**—This selection will completely remove *all* of the reports currently shown in the **Saved** tab; those in the **Reports** tab will remain unaffected. This can *not* be undone, so use caution before making this selection.

Search—The **Search** bar, in correlation with the report **Categories** pane, can be used to filter the list of options shown in the **Reports** and **Saved** tabs. To illustrate, if you choose the **Copies** category from the report **Categories** pane and then type "`labels`" in the **Search** bar, you will only see copy label-related reports in the **Report** and **Saved** tabs. If you have **All Reports** selected from the **Categories** pane and then "`labels`" into the **Search** bar, you would see *all* available label reports.

Shadow text appears in the **Search** bar prior to entering text of your own to remind you what report category/subcategory filters are being applied to your results. For example, if you've selected **Patrons** (category) - **Status** (subcategory), the default shadow text in the **Search** bar will read: **Patrons – Status**.

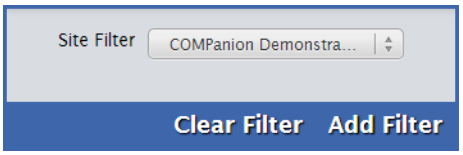
If you would like to search the *entire* collection of reports you will first need to select **All Reports** from the top of the report **Categories** pane section and then provide a term in the **Search** bar. For instance, if you're looking for a simple **Copy List** report and don't want to bother with the category/subcategory filters, simply select **All Reports** and start typing "`Copy List`" in the **Search** bar.

- NOTE-

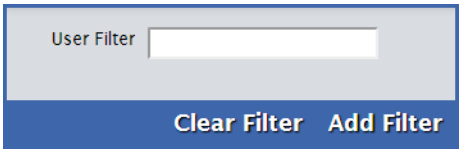
The **Search** bar is extremely helpful in that it searches *every* configurable field in the **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Locations** tabs and even *multiple* fields if search terms are separated by a space.

- **Favorites Filter**—This button only appears when the **Saved** tab is selected and only when you have some reports currently favorited. Once clicked, the filter remains enabled until it is manually disabled.

- **Site Code Filter**—This button only appears when the **Saved** tab is selected. Once clicked, it opens the **Site Filter** window, allowing you to enter a valid site ID code. After typing the first few characters, the site ID code will auto-complete—provided you have a matching site in the **Site Management** window *(see page 41)*. After clicking **Add Filter**, every search performed from the **Search** bar will filter your results by matching **Site ID Code(s)**. The filter remains enabled until it is manually disabled.



- **Operator Filter**—This button only appears when the **Saved** tab is selected. Once clicked, it opens the **Operator Filter** window, allowing you to enter a valid operator name. After typing the first few characters, the operator name will auto-complete—provided you have a matching operator in your **Patron Management** window *(see page 271)*. After clicking **Add Filter**, every search performed from the **Search** bar will filter your results by matching operator name. The filter remains enabled until it is manually disabled.



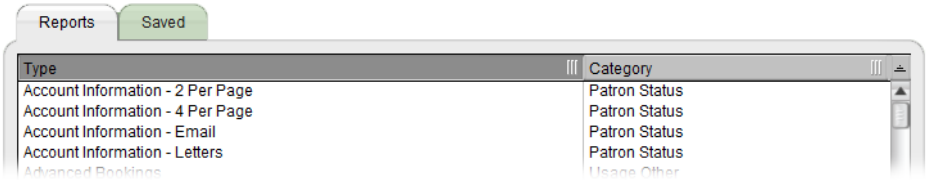
- **Save All**—Saves *all* changes made to multiple **Saved** reports in the **Reports** window; this option only appears when changes have been made to the selected—or any formerly selected—report in the **Saved** tab.
- **Revert All**—Reverts *all* changes made to multiple **Saved** reports in the **Reports** window; this option only appears when changes have been made to the selected—or any formerly selected—report in the **Saved** tab.
- **Print—**Clicking the **Print** button at the top of the window opens the **Operation Management** window and outputs a *".pdf"* for the selected report (which opens automatically when completed); report PDFs are also saved to the **Alexandria Support** directory in a folder named **Operation Files**. The **Print** button is replaced by the **Revert All** and **Save All** buttons once a report record has been modified and will remain that way until the report is saved. Every time you print a report, it will be recorded in your **Transaction** log.
- **Online Help**—Performs an online **Reports** help query in an external browser window—corresponding to the current report selection.

Report Selection Pane

Directly below the current report **Tools / Search** pane is the **Report Selection** pane, home to the **Report** and **Saved** tabs. Remember, the reports that appear in the **Report** and **Saved** tabs directly relate to the category (or subcategory) that is selected from the report **Categories** pane on the left-hand side of the window and/or to the text that is entered into the **Search** bar.

The Reports tab

The **Reports** tab houses the complete list of *all* available report types and their related categories; essentially, a complete report depository, containing every existing report template—used for quickly printing in an "ad-hoc"[1] style or reconfigured and conveniently saved (as a **Saved** report) for future use. These templates store *no* customized selection settings and should *not* be confused with default (or operator-created) **Saved** reports. If you haven't been able to locate the report template you are looking for, chances are you will find it in the **Reports** tab.



Using the report **Categories** pane, the **Reports** tab (shown above) can be filtered to only display reports relating to selected category/subcategories. For example, if you select **Circulation** from the **Categories** pane, the **Reports** tab will *only* contain **Circulation** reports; if you select a **Circulation** subcategory (e.g. **Listings**, **Notices**, **Holds**, etc), the options will be further refined.

Selecting a report type from the **Report Selection** pane automatically populates the bottom half of the window (i.e. **Selected Report** pane) which contains report information in the following tabs: **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Location**. These tabs contain the essential selection criteria crucial to how information in the report is ordered, organized, and presented. By default, the **Selection** tab has focus when the **Selected Report** pane is first made active.

Reports performed from the **Reports** tab are considered "quick" or "impromptu"; any modifications made to the **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, or **Location** tabs are discarded immediately after switching to another report category.

For example, if you have the **Titles** (category) - **General** (subcategory) - **Title List** (report type) selected and then click on the **Copies** category, all information that you may have modified or provided to the **Title List** report will be lost. Even if you were to immediately return to the **Titles** (category) - **General** (subcategory) - **Title List** (report type), you would find all your changes missing.

However, if you would like to save the report you've just been modifying in the **Reports** tab, click **Create New Saved Report** at the bottom of the **Selected Report** pane; this will add the current report type—including your modifications—to the **Saved** tab as a brand new, custom report.

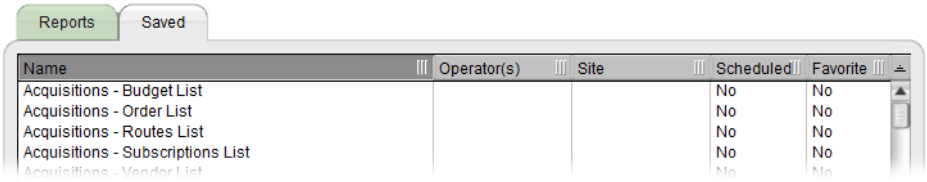
If the new report has *not* been given a **Name** in the **Overview** tab, a query window will ask for you to provide a name for your new **Saved** report. By default, the **Report Type** name (appended with the word "copy") will automatically fill the **Name** field.

1.Often improvised or impromptu; for a particular or specific purpose only, and for no other.

The Saved tab

Alexandria makes it easy to create your own frequently-used, custom reports. The **Saved** tab contains all previously created reports; these can be system defaults or operator-created. Individual **Saved** reports can be "favorited" by checking the **Favorite** box in the **Overview** tab; if the check is removed, it will no longer be marked as a "favorite" report.

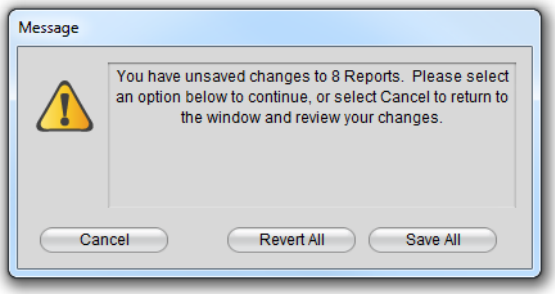
Keep in mind that a **Saved** report is only defined by the selection criteria that was used to create the report and *not* the results of the report itself. However, by default, all reports output to *".pdf"* or *".vwp"* are saved to the **Alexandria Support** directory in a folder named **Operation Files**.



The **Saved** tab contains system defaults as well as custom reports that operators have created and saved. Clicking on the column headers (e.g. **Name**, **Operator(s)**, **Site**, **Scheduled**, and **Favorite**) in the **Saved** tab will change the sort order. When the **Saved** tab is selected, the **Operator Filter**, **Site ID Code Filter**, and **Favorites Filter** buttons *(see page 186)* are available in the report **Tools/Search** pane.

Using the report **Categories** pane, **Saved** tab results can be filtered to only show reports for selected categories/subcategories. For example, if you select **Patrons** from the report **Categories** pane, the **Saved** tab will only show operator-created **Patrons** reports; if you select a **Patrons** subcategory (e.g. **Forms**, **Labels**, **Usage**, etc), your results will be further refined.

When a report appears red in the **Saved** list, it indicates that unsaved changes have been made to the report. When a **Saved** report has been changed, the **Revert All** and **Save All** buttons appear in the **Report Tools/Search** pane in place of the **Print** button; these buttons will save or revert *all* of the currently modified reports. If you try to close the **Reports** window with unsaved changes, Alexandria will ask you to save or revert *all* your changes; otherwise, click **Cancel** to return to the **Reports** window.

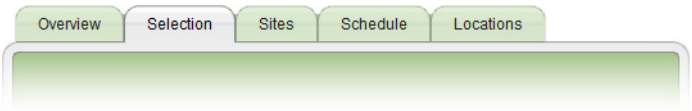

Message
You have unsaved changes to 8 Reports. Please select an option below to continue, or select Cancel to return to the window and review your changes.
Cancel
Revert All
Save All

When you make a report selection from the **Saved** tab, the **Selected Report** pane (i.e. the bottom-half of the window) is populated with the following tabs: **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Location**. By default, the **Overview** tab has focus when the **Selected Report** pane is first made active.

Once a **Saved** report has been selected, it can then be printed, modified, duplicated, or removed.

Selected Report Pane

The bottom-right area of the **Reports** window is home to the following tabs: **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Location**. These tabs allow you to configure selection, schedule, and output options for the report currently selected in the **Reports** or **Saved** tab. Not only that, they contain the essential selection criteria that is crucial to how information in the reports is ordered, organized, and presented.

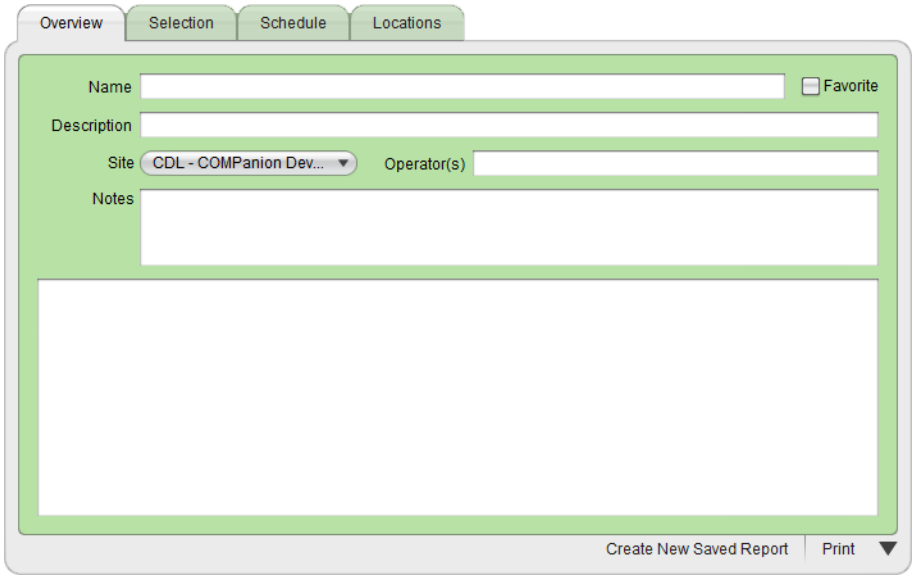


Be sure to *always* **Save All** changes you make to **Saved** reports in the **Reports** window; that way, you're guaranteed to have full, working, and scheduled reports.

Should you want nearly identical settings for each new operator-created report, you can **Duplicate** (Cmnd/Ctrl+D) them, give them a new name, and make whatever modifications you require (name, boolean, email, etc).

Overview tab

The **Overview** tab offers detailed summaries about what the report generates, what it selects and sorts by, whether or not it's scheduled, and where it outputs. This tab also allows you to **Name** the report (e.g. *Mrs. Smith - Overdues*), give it a succinct **Description** (e.g. *1-Line Overdue Listings*), and leave yourself (or others) usage **Notes** (e.g. *Run this report weekly!*).

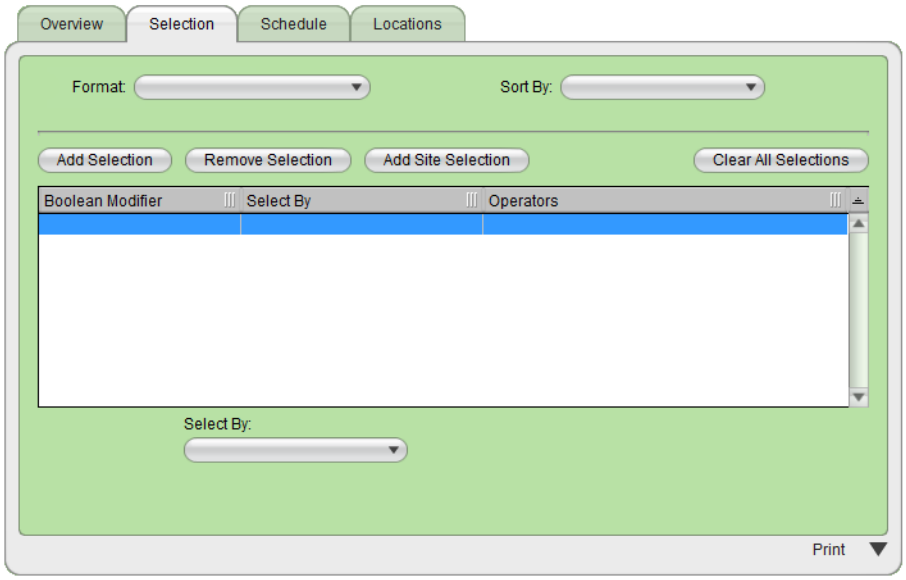


Overview Summary

- **Name—**Provide or edit the name of the report here (e.g. *Dr. Linus - LOST books*).
- **Favorite—**When this box is checked, the selected report will be classified as a "favorite" and can be ordered or filtered using the **Favorite** column header of the **Saved** tab or the **Favorites Filter** button *(page 188)*. Favoriting frequently-used reports is often helpful when you need to quickly locate one, especially if you find yourself running the same reports daily.
- **Description—**A brief description of the report (e.g. *Overdue listing and charges for Ms. Kathy's Homeroom*).
- **Site** and **Operator(s)—**These settings allow you to manually add and filter selected **Saved** reports by valid operators and/or site ID codes using the **Operator**/**Site Code Filter** buttons *(page 188)*; the **Operator(s)** and **Site** fields are *not* automatically populated when creating a new saved report.
- **Notes—**Provide (optional) general usage notes about the report here (e.g. *Report created for Marjorie - Run daily!*).
- **Overview—**This large field provides a system-generated summary of what the report produces: **Search By** and **Sort By** options, scheduled run times, selected sites, and saved file locations/outputs.

Selection tab

The **Selection** tab is where you build the report to suit your needs. The best way to use this tab is to fill in the fields and drop-down menus from left to right, top to bottom.

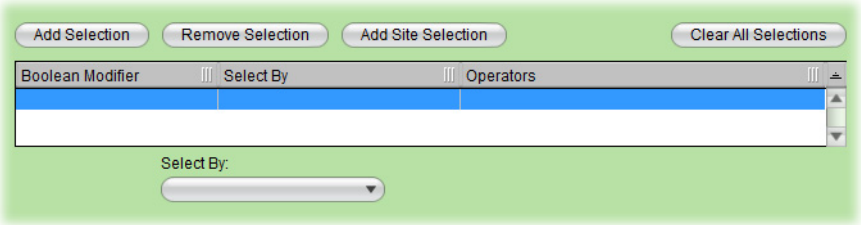


When creating a new report, you must first choose the *type* of report you want to build. The **Report Type** drop-down menu is *only* available from the **Saved** tab and is limited to the category for which the selected report belongs. For example, if **Circulation Notice – 4 Per Page** is the currently selected **Saved** report, the only available **Report Type** options will be related to the **Circulation** (category) - **Notices** (subcategory).

After you choose the report type, use the **Selection** tab's available drop-down menus, checkboxes, and text fields to build, format, arrange, limit and/or expand the scope of the report and the information included. The options available will differ from report to report depending on the chosen **Report Type**; for instance, most (but not all) **Report Types** have an affiliated **Sort By** drop-down selection. To see what options are available for each report, review the associated report page.

After selecting the initial information and layout, you can further refine your report using boolean selections; adding selections can help to make your report more efficient and meaningful. For example, say you want to print several **Weeding Lists** of damaged books to be pulled from library shelves. You intend to distribute these lists to your library aides based on the copy call numbers of the damaged items. In this case, you would likely want to sort the report by **Copy Call Number** (for ease of distribution) and then use boolean modifiers to assign specific areas to specific library aides. You could add a **Copy Status** selection (e.g. listed as **Available** and on your shelf), a **Copy Condition** selection (e.g. **Replace this item, not usable**) and finally a **Copy Shelving** selection (to make it easier to hunt down the damaged copies).

The **Add Selection**, **Remove Selection**, **Add Site Selection**, and **Clear All Selections** buttons appear *above* the boolean list. When applicable, the boolean operator drop-down menu (i.e. *OR*, *AND*, and *AND NOT*) appears to the left of the **Select By** drop-down menu while any related selection fields appear to the right; all this is located *below* the boolean list.



At this point, once the report is set up, you can print straight from the **Selected Report** pane (via "*.pdf*" or "*.vwp*") without doing anything else—especially if it's an "ad-hoc" report that you aren't necessarily going to need again in the future.

Selection Summary

The **Selection** tab will vary from report to report; here are some of the most common features:

- **Report Type—**Choose the general **Report Type** format first; you can only select report types based on the subcategory for which the report belongs. Depending on the **Report Type** you choose, additional selection options may be available.
- **Sort By—**The selection made from the **Sort By** drop-down menu determines how information in the report is ordered. Some selections sort by two (or more) values (e.g. **Patron Level / Name**). A complete list of report sorting options can be located on Alexandria's Online Help.
- **Select By—**This powerful drop-down menu allows you to add boolean modifiers that shape the report by including only the information you require. The **Select By** options are processed in top-down order[1]. You won't usually have to worry about the *default* values provided in the boolean list; instead, you'll want to use the **Add Selection** button to add your own modifiers.

  As you select values from the drop-down menus, new blank fields may appear, prompting you for information.

  One example of this would be the **Starting** and **Ending Date**[2] fields that appear when **Due Date** is chosen from the **Select By** drop-down menu, allowing you to provide the date range between a starting and ending value.

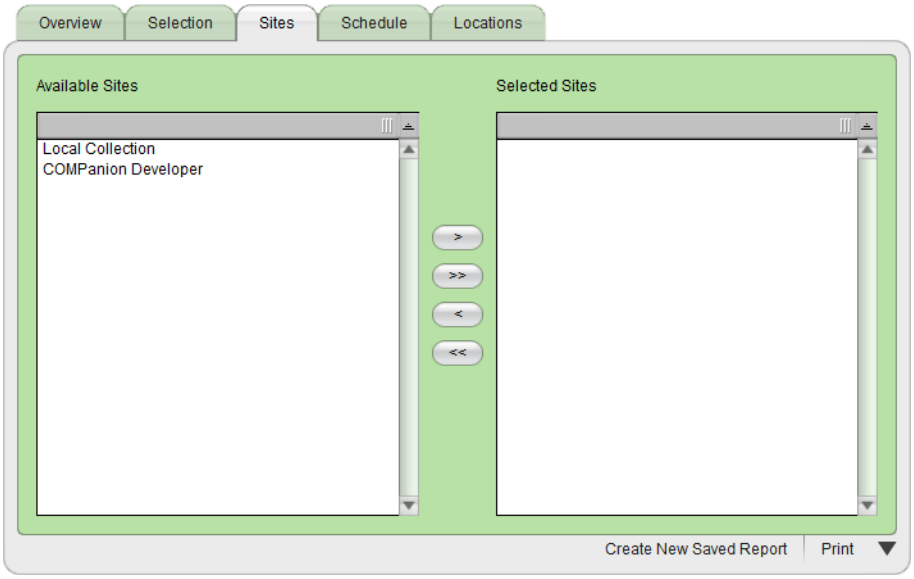
  Another example would be the **Starting** and **Ending With** fields. If you enter *only* a **Starting With** value, the program will select all records that begin with the entered text. Entering a **Grade** value of *"GR1"* would select grades *"GR100"*, *"GR10"* and "*GR1B37"*. Therefore, use *both* the **Starting** and **Ending With** fields, even if you are only searching for *one* value (e.g. *Silver*, *Silver*). To do an *exact* match for a text field range, enter an **Ending With** value that matches the **Starting With** value followed by space and exclamation point. Using **Grade** as our example, **Starting With** *"GR1"* and **Ending With** *"GR1 !"* (unless you really do have data named *"GR1 !"*). In other words, if you have two values with shared characters (e.g. *Silver, Silverman*) and don't want the report to apply to both, append the secondary (i.e. **Ending With**) value with a space and an exclamation mark (e.g. *Silver !*). A complete list of report selections options can be located on Alexandria's Online Help.

1.Using both **And** and **Or** operators at the same time *will* affect the results.
2.When you enter any type of specially-formatted information—such as dates—you can enter values in a wide range of formats. For example, you can enter the date December 1, 2015 as: *"Dec 1, 2015"* or *"12/1/15"* or *"12.1.15"* or *"12 1 15"*. If using the current year, you can just enter *"12/1"*. If the current month is December, you can just enter *"1"*. If you enter only a **Starting Date**, the program generates a "far future" date—which is the first of January, thirty years from the current date. If you enter only an **Ending Date**, the **Starting Date** defaults to January 1st, 1904 (i.e. the "far past"). If you don't enter any date, the **Starting Date** is set for one year in the past.

Sites tab (Distributed Union)

- NOTE -
The Distributed Union *(page 3)* is an optional configuration of Alexandria. You must have purchased the WAN license in order to use this configuration.

The **Sites** tab (only available for Distributed Union users) lets you choose which collections to draw the report information from. That means if you have multiple sites, you can either generate reports for more than one library, or just your own library. The **Sites** tab is *not* available for all reports.



Sites Summary

- Use the " **>** " button to move a selected site from the **Available Sites** to the **Selected Sites** field.
- Use the " **>>** " button to move *all* **Available Sites** to the **Selected Sites** field.
- Use the " **<** " button to move a selected site from the **Selected Sites** to the **Available Sites** field.
- Use the " **<<** " button to move *all* **Selected Sites** to the **Available Sites** field.

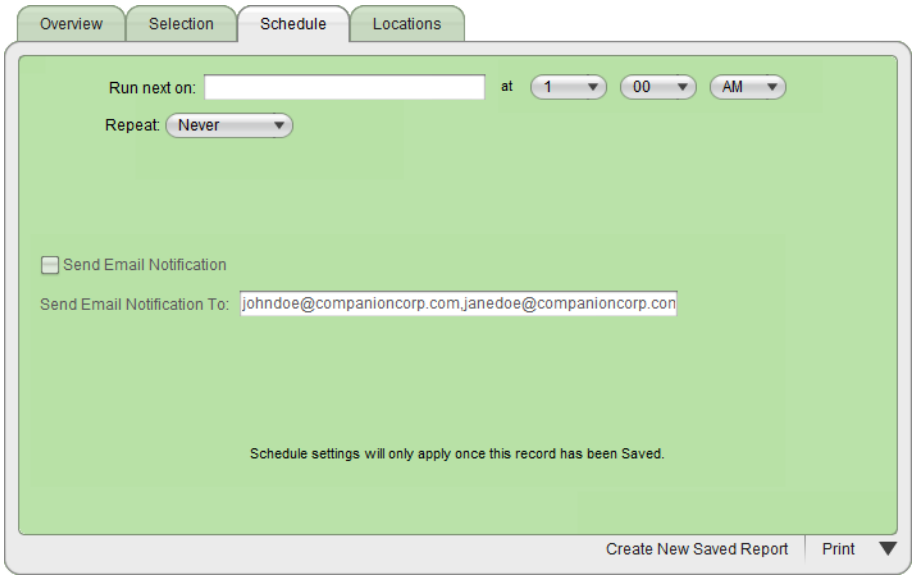
Schedule tab

The **Schedule** tab—useful only for **Saved** reports—is comprised of a fairly straightforward layout full of simple, time-saving features. For instance, let's say that you wanted to run a certain report every Friday at 5a.m. Using the **Repeat** drop-down menu, select **Weekly** and set the time drop-down menu(s) to **5** and **AM**. When the **Week(s) on** selection appears, select **Fri**.

If you want confirmation that the report is being performed at the indicated times and sent to the appropriate operators, check the **Send Email Notification** box and provide email addresses in the **Send Email Notification To** field (e.g. *johndoe@examplelibrary.com*).

You can list more than one email address separated by commas:

johndoe@examplelibrary.com, janedoe@examplelibrary.com

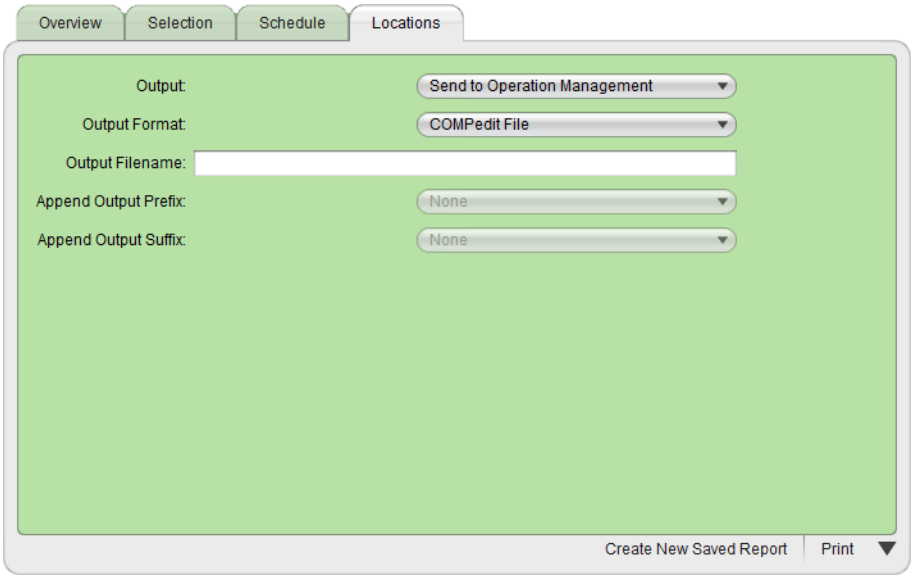


Schedule Summary

- **Run next on—** This field allows you to manually enter a date or select one from the **Date Picker** window (opened by clicking the calendar icon); this field adheres to COMPanion's **Adaptive Dates** *(see page 38)* standards.
- **Time—** Use these three drop-down menus to select the hour, minute, and ante/post meridiem.
- **Repeat—** You can select **Never**, **Daily**, **Weekly**, **Monthly**, **Yearly** from this drop-down menu. Secondary options may appear, depending on your selection; *no* secondary options appear for the **Never** or **Daily** selections as they are implied.
- **Every—** This field, allowing only numbers, appears if you select **Weekly**, **Monthly**, or **Yearly** from the **Repeat** drop-down menu. This field allows you to specify how often you would like to repeat the report. For example, entering *2* under the **Weekly** selection will repeat the report every two weeks (i.e. biweekly). However, there are limits to this functionality; don't expect to create a "Haley's Comet" report that runs every 3,965 weeks (or 76 years). **Weekly** is limited to *100* weeks (roughly two years), **Monthly** is limited to *50* months (a little over four years), and **Yearly** is limited to *1* year.
- **Week(s) on—** Select a day of the week from **Sun** through **Sat**.
- **Month(s) on—** Select a day of the month from the **1st** through the **31st**; you can alternately check the **On The** box which allows you to run the report on the first, second, third, or forth day of the week.
- **Every Year on—** Select a month from **Jan** through **Dec**; when this is selected, the **On The** box is automatically checked. You will need to select the **1st**, **2nd**, **3rd**, or **4th** day of the week on which the report will run.
- **Send Email Notification—** Check this box if you want an email notification sent upon report completion.
- **Send Email Notification To—** In this field, provide the email addresses that Alexandria will use to send notification emails when the report has finished; you can provide more than one email address separated by commas.

Locations tab

The **Locations** tab governs where finished reports are saved, sent, and stored (i.e. output).



By default, output is set to the **Operation Management** *(page 217)* window for "ad-hoc" reports and the **Scheduled Files** folder of your main **Alexandria Support** folder (in "*.pdf*"—Adobe's portable document format) for **Saved** reports. You are allowed to choose different output locations and multiple recipients (via email) depending on your **Output** settings.

The options available from the **Locations** tab change depending on which **Output** method you have selected. For example, if you choose **Send Report to FTP Server** from the **Output** drop-down menu, the **Username** and **Password** fields appear.

Locations Summary

- **Output—**You can choose to output to **Send to Operation Management**, **Send to FTP Server**, or **Send Link in Email**.
- **Username** and **Password—**The **Username** and **Password** fields only appear (and are required) when uploading your reports to an FTP site.
- **Output Format—**Choose to save the file output as either **COMPedit** file (“*.vwp*”) or **Portable Document Format** (“*.pdf*”).
- **Output Filename—**Set the name of the saved report file; you can append either the beginning or the end of the filename with current date and time or the Data Station serial number (see **Append Output Prefix**/**Suffix** below). You can indicate folder paths using “/” or “\\”.
- **Append Output Prefix—**By selecting **Date & Time** you can choose to add the current date at the *beginning* of your output filename; by choosing **Data Station Serial #** you can choose to add your hosted Data Station’s serial number at the *beginning* of your output filename (e.g. *20150107 500 Titles - Lifetime Usage.vwp*).
- **Append Output Suffix—**By selecting **Date & Time** you can choose to add the current date at the *end* of your output filename; by choosing **Data Station Serial #** you can choose to add your hosted Data Station’s serial number at the *end* of your output filename (e.g. *Titles - Lifetime Usage 20150107 500.pdf*).

Printing Reports

Clicking the **Print** button at the top of the **Reports** window opens the **Operation Management** *(page 217)* and outputs a *".pdf"* for the selected report. This button simply prints the report to the screen and ignores any **Locations** settings.

However, the **Print** button at the bottom-right of the window is dynamic; its functionality depends on what you choose from the arrow menu located to the right of button. Making a selection from this menu will change the appearance and/or description of the lower-right **Print** button and retain those changes until later adjusted.

Clicking the arrow reveals a selection menu containing the following dynamic options:

- **Print** *(to PDF)*—Prints the report to screen in *".pdf"* format and dynamically changes the **Print** button to **Print** *(to PDF)*.
- **Print as VWP**—Prints the report to screen in *".vwp*" format and dynamically changes the **Print** button to **Print as VWP**.
- **Print to Output**—The third selection from this menu (generally referred to as the **Print to Output** button for illustrative purposes) changes the **Print** button to match the **Output** setting of the **Locations** tab. In other words, this selection allows you to emulate—and deliver—the report according to the **Output** settings of the **Locations** tab. For example, let's say you've built a report that saves a *".pdf"* to your FTP server; the **Output** selection in the report's **Locations** tab necessitates the **Send to FTP Server** option. Therefore, if the **Print to Output** selection is made, **Send to FTP Server** would appear in place of the **Print** button. Clicking **Send to FTP Server** (i.e. **Print to Output**) will immediately run the report and save a *".pdf"* to your desktop.

All reports printed to *".pdf"* or *".vwp"* will open automatically; however, they are also saved to the **Alexandria Support** directory in a folder named **Operation Files**.

Every time you print a report, it is recorded in your **Transaction** log.

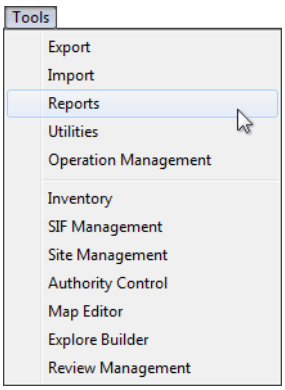
In Conclusion

In closing, take some time to explore the *categories* and *subcategories* and set up some favorite reports that you'd like to easily access and run. In the end, if you still have questions, remember you can always call or email COMPanion's Technical Support team at *(800) 347-4942*.

Remember, should you want nearly every setting the same for each report, you can duplicate a selected report, give it a new name, and make whatever changes you need (name, boolean, email recipients, etc).

If you decide to delete a report, select it in the **Saved** tab and then choose **Delete Selected Report** (Cmnd/Ctrl+R) from the primary **Actions** menu. Additionally, you may remove *all* **Saved** reports in a particular category/subcategory by selecting **Delete All Reports Shown** from the primary **Actions** menu. Before deleting *any* reports, the program will ask you to confirm—just in case you accidentally selected that option. COMPanion defaults can be restored by selecting **Restore Missing Defaults** from the primary **Actions** menu; however, custom-made **Saved** reports can *not* be restored.

Step-by-Step: Printing a Quick Report



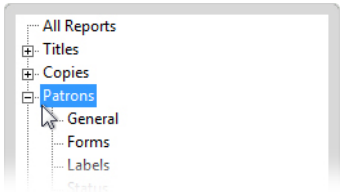
> **- NOTE -**
>
> If you are more interested in creating long-lasting reports, you can follow the longer step-by-step guide on page 204 to learn how to create your own, scheduled **Saved** reports.

You can quickly create and perform "ad-hoc" reports by following these general steps:

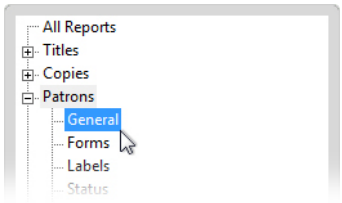
Step 1. Select **Reports** from the main **Tools** menu.

Step 2. The **Reports** window will appear; if necessary, you have the ability to modify report sites *(only available for Distributed Union users)* and selections.

Step 3. The left-hand side of the window is home to the **Categories** pane, containing a list of *all* existing report categories (e.g. **Titles**, **Copies**, **Patrons**, **Circulation**, etc.). **Category** selections act as filters, reducing the number of options that appear in the **Reports** tab (of the **Report Selection** pane) on the right. Select a specific report category from this pane (e.g. **Patrons**).

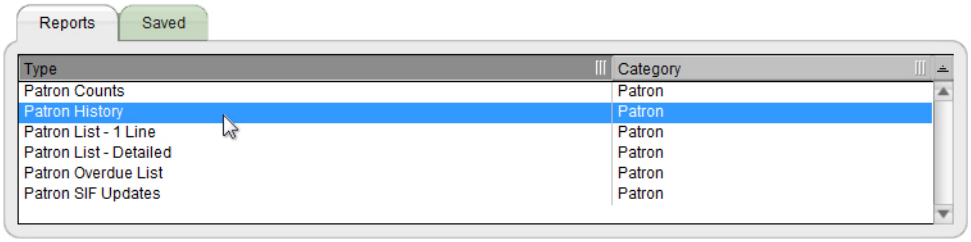


Step 4. Next, further refine your options by choosing a subcategory; 'subcategories' are subsidiaries of the main category that further narrow the focus of the report. For instance, the **Patrons** category contains the **General**, **Forms**, and **Labels** subcategories, among others. You are able to expand or contract subcategory sections by clicking on the little icon located to the left of the main category name.



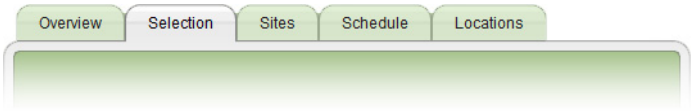
Step 5. Alternately, if you know *exactly* what you're looking for, you can skip the **Categories** pane altogether and just use the **Search** bar to find your desired report (e.g. type `Patron History`).

Step 6. Once you have narrowed down your report options (to only display relevant reports), choose the report you want to run from the **Reports** tab.



Step 7. Selecting a report type from the **Selection** pane automatically populates the bottom half of the window (i.e. the **Selected Report** pane) which contains report information in the **Selection** and **Sites** *(Distributed Union)* tabs, among others; these tabs allow you to configure selection options for the currently selected report and how the report is ordered, organized, and presented.

Step 8. If necessary, use the **Selection** tab to build, format, and arrange the report according to your needs. You may set any combination of drop-down menus, tick optional checkboxes, and configure fields that limit or expand the information included in the report; these options differ depending on the selected report type.



Most (but not all) report types include a **Sort By** drop-down menu; which determines the sort order hierarchy for the information included in the report. Some selections sort by two values. A complete list of report sorting options can be found on Alexandria's Online Help.

After selecting the initial information and layout, you can further refine your report using boolean selections; adding selections can help to refine your report, making it more efficient and understandable.

The **Add Selection**, **Remove Selection**, **Add Site Selection**, and **Clear All Selections** buttons appear *above* the boolean list. When applicable, the boolean operator drop-

down menu (i.e. *OR*, *AND*, and *AND NOT*) appears to the left of the **Select By** drop-down menu while any related selection fields (if any) appear to the right; all this is located *below* the boolean field.

The **Select By** drop-down menu is powerful; you can add as many *OR*, *AND*, and *AND NOT* boolean modifiers as you need to build the report so that it only includes the information *you* require. The **Select By** options are processed in top-down order[1]. You won't usually have to worry about the *default* values provided in the boolean list; instead, you'll want to use the **Add Selection** button to add your own modifiers.

As you *select* values from drop-down menus, new blank fields may appear, prompting you for information. One example of this would be the **Starting** and **Ending Date**[2] fields that appear when **Due Date** is chosen from the **Select By** drop-down menu, allowing you to provide a starting and ending date range.

Another example would be the **Starting** and **Ending With** fields. If you enter *only* a **Starting With** value, the program will select all records that begin with the entered text. Entering a **Grade** value of *"*`GR1`*"* would select grades *"*`GR100`*"*, *"*`GR10`*"* and "`GR1B37`".

To do an *exact* match for a text field range, enter an **Ending With** value that matches the **Starting With** value followed by space and exclamation point. Using **Grade** as our example, **Starting With** *"*`GR1`*"* and **Ending With** *"*`GR1 !`*"* (unless you really do have data named *"*`GR1 !`*"*).

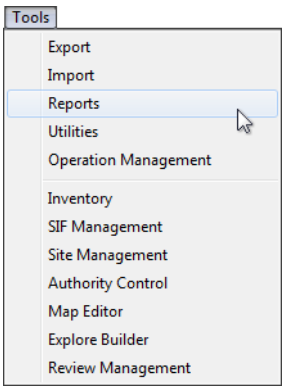
A complete list of report selections options can be located on Alexandria's Online Help.

Step 9. If necessary, use the **Sites** tab *(only for Distributed Union)* to choose which collection(s) to draw the report information from. This means if you have multiple sites, you can generate reports for more than one library, or just your own library. The **Sites** tab is *not* available for all reports.

Step 10. When you are ready to print your finished report, click the **Print** button at the top of the window; this opens the **Operation Management** window and outputs a *".pdf"* for the selected report. Although it's not recommended, while the report is processing in the **Operation Management** window, you can perform other tasks, check items in and out or even prepare other reports. If necessary, click the **Cancel** button to stop the report from processing. If the **Operation Management** or **Report** window becomes hidden behind other windows, find it again using the **Windows** menu.

Step 11. All reports printed to *".pdf"* or *".vwp"* will open automatically; however, they are also saved to the **Alexandria Support** directory in a folder named **Operation Files**.

1.Using both **And** and **Or** operators at the same time *will* affect the results.
2.When you enter any type of specially-formatted information—such as dates—you can enter values in a wide range of formats. For example, you can enter the date December 1, 2015 as: *"Dec 1, 2015"* or *"12/1/15"* or *"12.1.15"* or *"12 1 15"*. If using the current year, you can just enter *"12/1"*. If the current month is December, you can just enter *"1"*. If you enter only a **Starting Date**, the program generates a "far future" date—which is the first of January, thirty years from the current date. If you enter only an **Ending Date**, the **Starting Date** defaults to January 1st, 1904 (i.e. the "far past"). If you don't enter any date, the **Starting Date** is set for one year in the past.



Step-by-Step: Creating a Saved Report

Follow these general steps to create your own report:

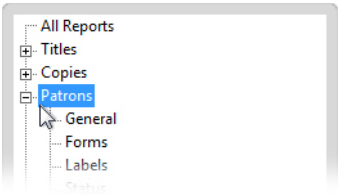
Open the Reports Window

Step 1. Select **Reports** from the main **Tools** menu.

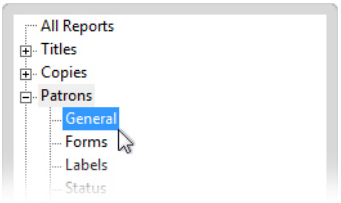
Step 2. The **Reports** window will appear; from here you have the ability to create or modify report names, selections, sites, schedule, and locations.

Choose the Report Category

Step 3. The left-hand side of the window is home to the **Categories** pane, containing a list of *all* existing report categories (e.g. **Titles**, **Copies**, **Patrons**, **Circulation**, etc.). Category selections from the report **Categories** pane act as filters, reducing the number of options that appear in the **Reports** and **Saved** tabs (i.e. the report **Selection** pane) on the right. Select a specific report category from this pane (e.g. **Patrons**).



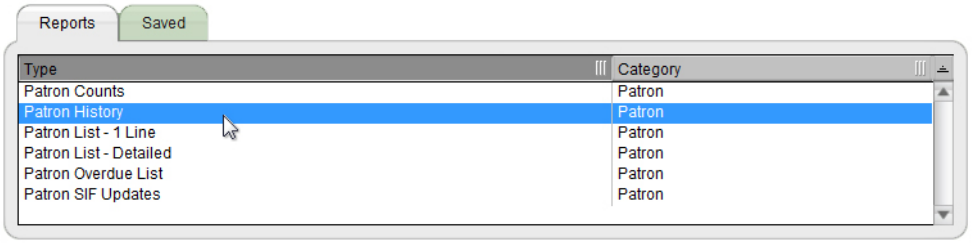
Step 4. Next, further refine your options by choosing a subcategory; 'subcategories' are subsidiaries of the main category that further narrow the focus of the report. For instance, the **Patrons** category contains the **General**, **Forms**, and **Labels** subcategories, among others. You are able to expand or contract subcategory sections by clicking on the little icon located to the left of the main category name.



Step 5. Alternately, if you know *exactly* what you're looking for, you can skip the **Categories** pane altogether and just use the **Search** bar find your desired report (e.g. type `Patron History`).

Select the Report Type

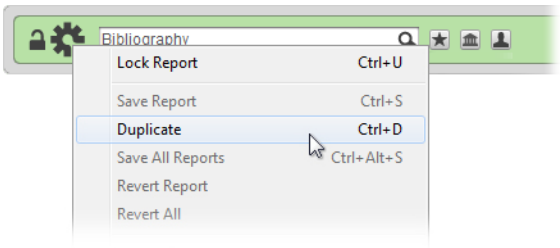
Step 6. Once you have narrowed down your report options (to only show relevant reports), choose the report you want to perform from either tab.



Step 7. Selecting a report type from the **Reports** or **Saved** tab of the **Selection** pane automatically populates the bottom half of the window (i.e. the **Selected Report** pane) which contains report information in the following tabs: **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Location**. These tabs allow you to configure selection, schedule, and output options for the report currently selected from the **Selection** pane above. Not only that, they contain the selection criteria crucial to how reports are ordered, organized, and presented.

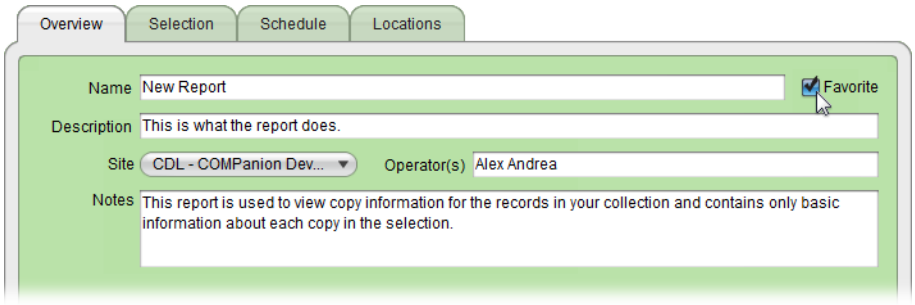
Step 8. If there *aren't* any reports in the **Saved** tab—or none that meet your needs—you can quickly create a new one. Use the **Categories** pane to narrow your template selections. When you find the template from which you'd like to create a new **Saved** report, select (highlight) it and choose **Create New Saved Report (Cmnd/Ctrl+D)** from the primary **Actions** menu or at the bottom of the **Selected Report** pane; this will take you to the **Selection** tab of the **Selection** pane.

Step 9. If there *is* an existing **Saved** report that you wish to duplicate (or rename), select (highlight) it and choose **Duplicate (Cmnd/Ctrl+D)** from the primary **Actions** menu; this takes you to the **Overview** tab of the **Selection** pane.



Overview tab

Step 10. The **Overview** tab provides a summary of what the report generates, what it selects and sorts by, whether or not it's scheduled, and where it outputs. This tab also allows you to **Name** the report, give it a succinct **Description**, and provide any general **Notes** you wish. If you'd like this report to be marked as one of your "favorites", check the **Favorite** box now. The **Site** and **Operator(s)** settings allow you to add valid operator(s) and site ID codes to the report.



Selection tab

Step 11. Use the **Selection** tab to build, format, and arrange each report (according to your personalized combination of drop-down menus, text fields, and checkbox options).

First, choose the *type* of report you'd like to build. The **Report Type** drop-down menu is only available from the **Saved** tab and is limited to the category and subcategory selections to which the report belongs. For example, if you have chosen a **Circulation** (category) and **Charges** (subcategory) report, then only **Circulation** - **Charges** reports will be available from the **Report Type** drop-down menu.

After you choose the report type, you may set drop-down menus, tick optional checkboxes, and configure fields that limit or expand the information included in the report; these options differ depending on the selected **Report Type** (e.g. some reports have a **1-Line** and **Detailed** format).

Most (but not all) **Report Types** include a **Sort By** drop-down menu; which determines the sort order hierarchy for the information included in the report. Some selections sort by two values. A complete list of report sorting options can be found on Alexandria's Online Help.

After selecting the initial layout and information you want included in the report, you can further refine your selection criteria using boolean operators. Adding selections can help refine your report, making it more efficient and understandable.

The **Add Selection**, **Remove Selection**, **Add Site Selection**, and **Clear All Selec-**

tions buttons appear *above* the boolean list. When applicable, the boolean operator drop-down menu (i.e. *OR*, *AND*, and *AND NOT*) appears to the left of the **Select By** drop-down menu while related selection fields (if any) appear to the right; all this is located *below* the boolean field.

The **Select By** drop-down menu is powerful; you can add as many *OR*, *AND*, and *AND NOT* boolean modifiers as you need to build the report so that it only includes the information *you* require. The **Select By** options are processed in top-down order[1]. You won't usually have to worry about the *default* values provided in the boolean list; instead, you'll use the **Add Selection** button to add your own modifiers.

As you select values from drop-down menus, new blank fields may appear, prompting you for information. One example of this would be the **Starting** and **Ending Date**[2] fields that appear when **Due Date** is chosen from the **Select By** drop-down menu, allowing you to provide a starting and ending date range.

Another example would be the **Starting** and **Ending With** fields. If you enter *only* a **Starting With** value, the program will select all records that begin with the entered text. Entering a **Grade** value of *"*`GR1`*"* would select grades *"*`GR100`*"*, *"*`GR10`*"* and "`GR1B37`*"*.

To do an *exact* match for a text field range, enter an **Ending With** value that matches the **Starting With** value followed by space and exclamation point. Using **Grade** as our example, **Starting With** *"*`GR1`*"* and **Ending With** *"*`GR1 !`*"* (unless you really do have data named *"*`GR1 !`*"*).

A complete list of report selections options can be located on Alexandria's Online Help.

Sites tab

Step 12. The **Sites** tab *(only for Distributed Union)* lets you choose which collections to draw the report information from. This means if you have multiple sites, you can generate reports for more than one library, or just your own library. The **Sites** tab is *not* available for all reports.

Schedule tab

Step 13. If you don't want to immediately perform the report, you can use the **Schedule** tab to set up a "one-time" or "repeating" operation. Provide a valid **Run Next On** and **Repeat** frequency in order to establish a schedule.

Step 14. If you want confirmation that the report is being performed at the indicated times and sent to the appropriate operators, check the **Send Email Notification** box and provide email addresses in the **Send Email Notification To** field; you can list more than one email address separated by commas.

1.Using both **And** and **Or** operators at the same time *will* affect the results.

2.When you enter any type of specially-formatted information—such as dates—you can enter values in a wide range of formats. For example, you can enter the date December 1, 2015 as: *"Dec 1, 2015"* or *"12/1/15"* or *"12.1.15"* or *"12 1 15"*. If using the current year, you can just enter *"12/1"*. If the current month is December, you can just enter *"1"*. If you enter only a **Starting Date**, the program generates a "far future" date—which is the first of January, thirty years from the current date. If you enter only an **Ending Date**, the **Starting Date** defaults to January 1st, 1904 (i.e. the "far past"). If you don't enter any date, the **Starting Date** is set for one year in the past.

Locations tab

Step 15. The **Locations** tab governs where scheduled **Saved** reports are sent and stored. By default, output is set to the **Scheduled Files** folder of your main **Alexandria Support** folder, saved in "*.pdf*"—Adobe's portable document format. You are allowed to choose different output locations and multiple recipients (via email) depending on your **Output** settings.

Step 16. The options available on the **Locations** tab change depending on which **Output** method you have selected. Choose an **Output Format**; Adobe "*.pdf*" or COMPedit "*.vwp*". Use the **Output Filename** to name the report; you can append either the beginning or the end of the filename with current date and time or the Data Station serial number.

Saving and Printing Your Report

Step 17. When you are finished, click **Save All** to have a working, fully scheduled report that you won't have to worry about manually performing again for some time.

Step 18. If you would like to print your finished report as a "*.pdf*" click the **Print** button at the top of the window; this button simply prints the report to the screen and ignores your **Locations** settings. However, you can also use the **Print** menu at the bottom-right of the screen to **Print** *(as PDF)*, **Print as VWP**, or *"emulate"* the **Output** selections you've made in the **Locations** tab. For example, if you have the **Output** (in the **Locations** tab) set to **Save As File**, the **Print** menu will show "**Save As File**" as an available selection and will manually save the file to the **Alexandria Support** directory in a folder named **Operation Files**.

Step 19. Clicking the **Print** button at the top (or sometimes bottom-right) of the window opens the **Operation Management** window and outputs a "*.pdf*" for the selected report. Although it's not recommended, while the report is processing in the **Operation Management** window, you can perform other tasks, check items in and out or even prepare other reports. If necessary, click the **Cancel** button to stop the report from processing. If the **Operation Management** or **Report** window becomes hidden behind other windows, find it again using the **Windows** menu.

Step 20. All reports printed to "*.pdf*" or "*.vwp*" will open automatically; they are also saved to the **Alexandria Support** directory in a folder named **Operation Files**.

Voilà! You've created and printed your own **Saved** report!

Getting Started With Utilities

Alexandria® Hosted Service

- WARNING -
If you are *ever* encouraged to **Archive** before performing a utility, the correct response should *always* be **Yes**.

- NOTE -
Remember, you must have first established your **Policies Preferences** before you can perform utilities that migrate items or patrons to different policies.

An Introduction to Utilities

Most **Circulation** window commands are designed to modify individual pieces of data one entry at a time; utilities, however, can change large amounts of information in your database at once.

The **Utilities** window allows you to create your own custom set of commonly-used, essential utilities; we provide the general templates that help you build the utilities that modify, transfer, remove, update, or verify information in your database. After the initial setup of your custom utilities, you won't need to adjust the particulars very often.

The following chapter provide a brief overview of the **Utilities** window and then guides you through the step-by-step of creating a utility.

The Utilities Window In More Detail

At first glance, faced with an abundance of tabs and large fields containing long lists of names, the **Utilities** window may seem overwhelming. *Don't panic!* Although it may look complicated, the **Utilities** interface behaves almost identically to that of the **Reports** window.

If you've been reading these chapters in sequential order, you should now have a firm understanding of how the **Reports** window operates, and consequently, how the **Utilities** window functions as well. However, if you yet haven't familiarized yourself with that area, we advise that you to stop now, return to the chapter detailing **Reports** *(page 183)* and then return here afterward. Once you have reviewed the **Reports** chapter in detail, you should have a solid foundation and understanding of the inner-workings of the **Utilities** window. If you require a more comprehensive treatment of the **Utilities** window (including all its associated categories, tabs, and selectable options), please review the "*Utilities*" section(s) of Alexandria's Online Help.

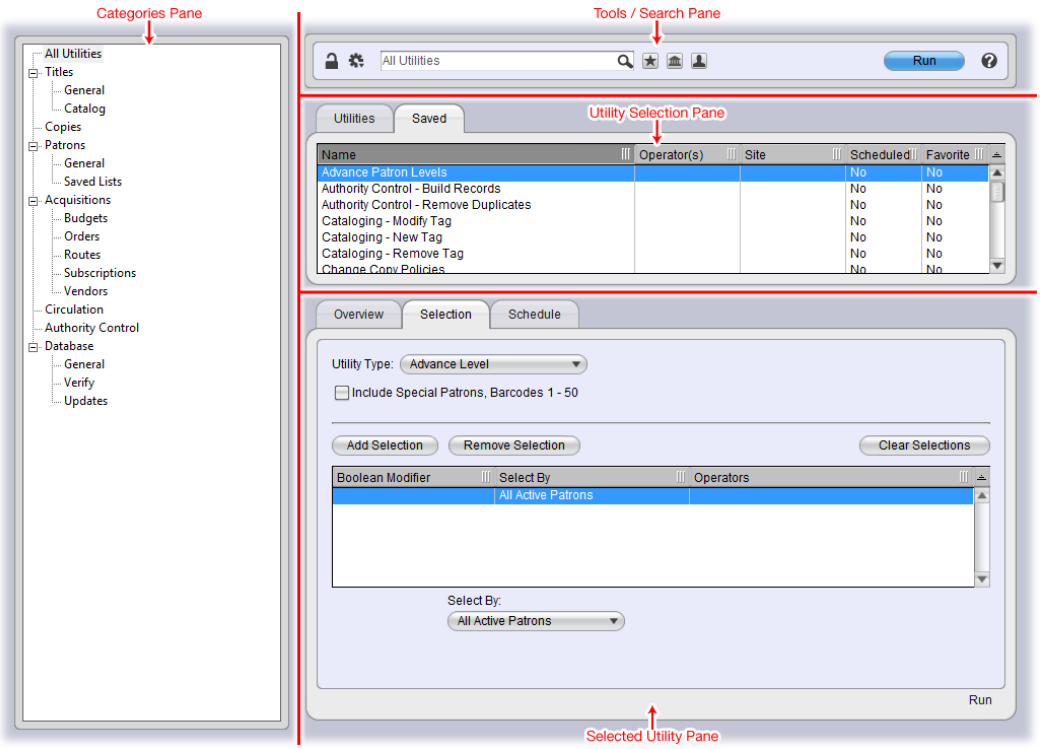
The **Utilities** window was designed with simplicity in mind; placing everything in a single, easily navigable window that allows you to quickly find, modify, create, and run utilities.

Additionally, the **Utilities** window allows you to customize utilities so that they only modify, clear, or clean required information: records of interest, title/copy policies, patron histories, and all types of acquisitions.

In order to become a utilities wizard, there are only *three* essential things you need to understand: category searching, utility templates, and creating custom utilities.

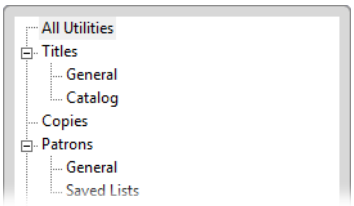
The **Utilities** window was developed using the familiar three-panel layout found in many of Alexandria's management interfaces.

- The left-hand side of the window is comprised of the **Categories** pane, containing an organized list of all existing utility categories (e.g. **Titles**) and subcategories (e.g. **Catalog**). Selections from this pane act as filters, allowing you to narrow your options and show only relevant utilities.
- The top-right section of the window contains the **Tools/Search** pane along with the **Utility Selection** pane (i.e. the **Utilities** and **Saved** tabs), which allows you to select the specific utility you would like to view, modify, or run.
- The **Selected Utility** pane—the bottom-right area of the window—contains options for the highlighted (i.e. selected) utility, spread throughout the following three tabs: **Overview**, **Selection**, and **Schedule**.



Utility Category Filters

The first step in performing useful utilities is picking the proper utility category. The utility **Categories** pane on the left-hand side of the window is a collection of categories and subcategories that can reduce the number of options that appear in the **Utility Selection** pane (i.e. the **Utilities** and **Saved** tabs) on the right. You are able to expand or contract associated subcategory sections by clicking on the associated icon located to the left of the main category name. Selecting (highlighting) one of the main category (or subcategory) names (e.g. **Titles**) will reveal all of the utilities available for that category (or subcategory). For example, if you want to run an **Advance Grade** utility, you can't do it with the **Circulation** category selected—that's a **Patrons** (category) utility that you'll find under the **General** subcategory. Selecting the **All Utilities** from the top of the categories list will populate the **Utilities** and **Saved** tabs with *all* available utility options.



For a comprehensive list of all utility categories and subcategories, please review the "*Utilities*" section(s) of Alexandria's Online Help.

Utilities Tools / Search Pane

The second half of the **Utilities** window is largely dedicated to the currently selected utility (filtered using the **Categories** pane on the left), which contains all of the utility's configurable options and editable fields.

Topping this section of the window is a long, rectangular area containing the **Save All** and **Revert All** buttons[1], the **Run** button, the **Online Help** icon, the **Lock**/**Unlock** icon and the primary **Actions** icon which performs functions related to the selected utility.

For a comprehensive list of all **Tools**/**Search** pane options, including **Actions** menu selections, please review the "*Utilities*" section(s) of Alexandria's Online Help.

1.The **Save All** and **Revert All** buttons are conditional and only appear when changes have been made to various fields of an export selected from the **Saved** tab

Utility Selection Pane

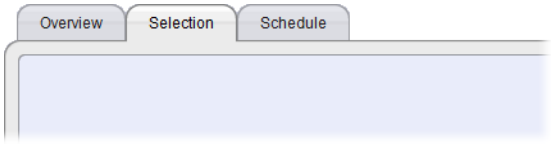
Directly below the current utility **Tools / Search** pane is the utility **Selection** pane, home to the **Utilities** and **Saved** tabs. Remember, the utilities that appear in the **Utilities** and **Saved** tabs directly relate to the category (or subcategory) that is selected from the utility **Categories** pane on the left-hand side of the window and/or to the text that is entered into the **Search** bar.

- The **Utilities** tab houses the complete list of *all* available utility types and their related categories; essentially, a complete utility depository, containing every existing utility template—used for quickly performing "on-the-fly" or operator-created utilities saved for future use. The templates stored here contain *no* customized selection settings and should not be confused with default (or operator-created) **Saved** utilities. If you haven't been able to locate the utility template you are looking for, chances are you will find it in the **Utilities** tab.
- The **Saved** tab contains a list of previously created utilities; these can be system defaults or operator-created. Individual **Saved** utilities can be "favorited" by checking the **Favorite** box in the **Overview** tab; if the check is removed, it will no longer considered a "favorite" utility.

For comprehensive coverage of the **Utilities** and **Saved** tabs, please review the corresponding "*Utilities*" section(s) of Alexandria's Online Help.

Selected Utility Pane

The bottom-right area of the **Utilities** window is home to the following tabs: **Overview**, **Selection**, and **Schedule**. These tabs allow you to configure options for the utility currently selected in the **Utilities** or **Saved** tab. Not only that, they contain the essential selection criteria that is crucial to how utilities are scheduled and performed.



Be sure to always **Save All** changes you make to **Saved** utilities in the **Utilities** window; that way, you're guaranteed to have full, working, and scheduled utilities.

For a complete explanation of the **Overview**, **Selection**, and **Schedule** tabs, please review the corresponding "*Utilities*" section(s) of Alexandria's Online Help.

Performing Utilities

Clicking on the **Run** button at the top (or sometimes bottom-right) of the window opens the **Operation Management** window and performs the selected utility.

Every time you run a utility, it will be documented in your **Transaction** log.

For a step-by-step guide on how to successfully perform a utility, please review the corresponding "*Utilities*" section(s) of Alexandria's Online Help.

- NOTE -
If you are *ever* encouraged to **Archive** before performing a utility, the correct response should *always* be **Yes**.

In Conclusion

In closing, take some time to explore the categories and subcategories and set up some favorite utilities that you'd like to easily access and run. In the end, if you still have questions, remember you can *always* call or email COMPanion's Technical Support team at *(800) 347-4942* or by email via: `support@companioncorp.com`

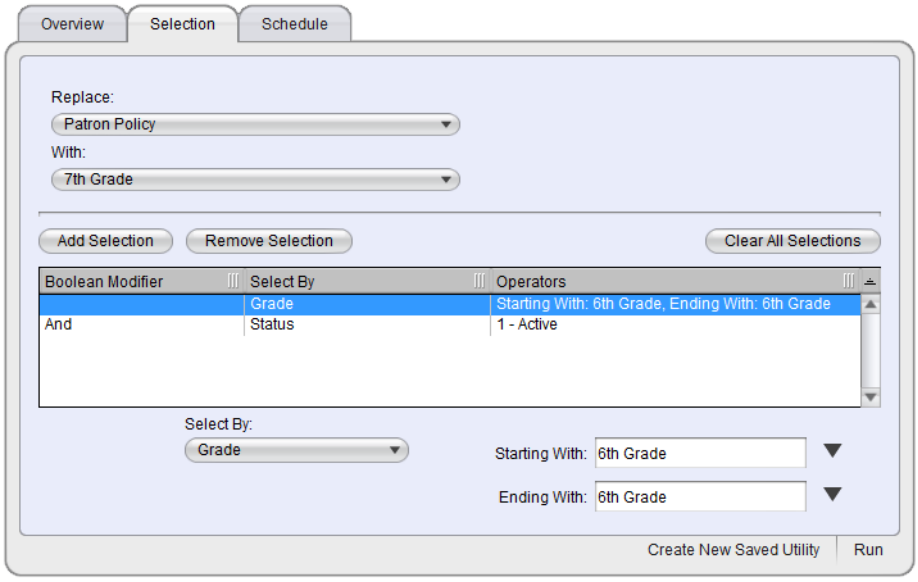
Remember, should you want nearly every setting the same for each utility, you can duplicate a selected utility, give it a new name, and make whatever changes you need (name, boolean, email recipients, etc).

If you decide to delete a utility, select it in the **Saved** tab and then choose **Delete Selected Utility** (Cmnd/Ctrl+R) from the primary **Actions** menu. Additionally, you may remove all **Saved** utilities in a particular category/subcategory by selecting **Delete All Utilities Shown** from the primary **Actions** menu. Before deleting any utilities, the program will ask you to confirm—just in case you accidentally selected the option. COMPanion defaults can be restored by selecting **Restore Missing Defaults** from the primary **Actions** menu; however, custom-made **Saved** utilities can not be restored.

Again, for more comprehensive coverage of the **Utilities** window, please review the corresponding "*Utilities*" section(s) of Alexandria's Online Help.

Moving Patrons to a New Policy

Now that you've set up your **Patron** policies, you can use the **Utilities** window to assign them wholesale. If your new policies are set up by grade, this will be very easy to accomplish. If you are using some other identifier (e.g. **Homeroom**), find the most common value for those people and use it as your **Select By** criteria. The example pictured below demonstrates how to switch patrons on the **6th Grade** policy to the **7th Grade** policy using **Grade** as the **Select By** criteria.



To change the default policy for a group of selected patrons:

Step 1. Select **Utilities** from the **Tools** menu.

Step 2. Select (highlight) **Patrons** from the utility **Categories** pane on the left-hand side of the **Utilities** window.

Step 3. Next, choose the **General** subcategory located directly below.

Step 4. From the **Utility Selection** pane, choose the **Replace Information** utility type.

Step 5. Under the **Selection** tab of the **Selected Utility** pane; select **Patron Policy** from the **Replace** drop-down menu before setting the **With** drop-down menu (e.g. **3rd Grade**).

Step 6. Next, set the **Select By** to the desired criteria (e.g. **Homeroom**, **Grade**, **Policy**).

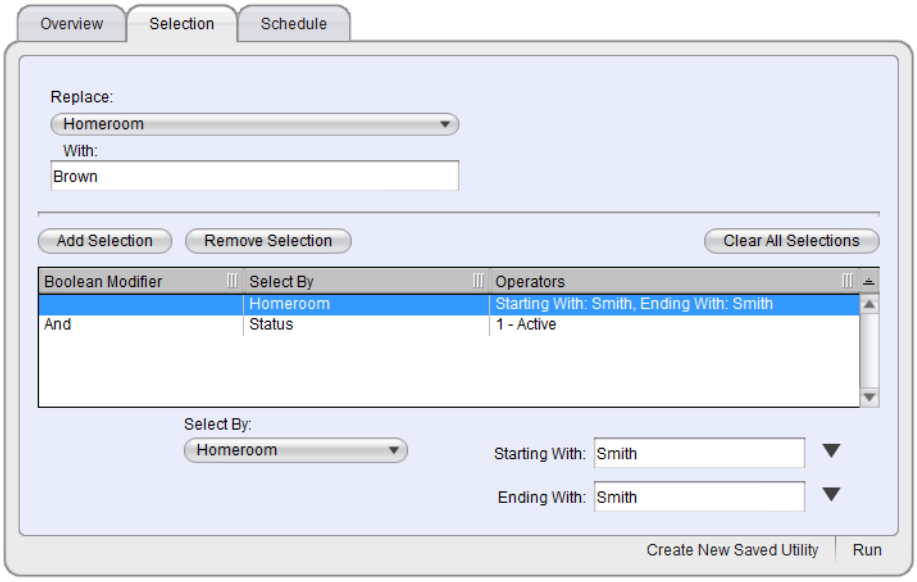
Step 7. Provide the **Starting With** / **Ending With** fields or the **From** / **Through** drop-down menus with the appropriate information (e.g. **Standard** / **System Patrons**).

Step 8. Click **Run**. Remember, if you are asked whether or not you want to archive, the answer should *always* be **Yes**.

Once you have switched all your patrons to the new policy, statistics will be kept according to those *new* policies. Prior statistics *can not* and *will not* be changed.

Moving Patrons to a New Homeroom

If the patron information you receive from your SIS (Student Information System) does not include the homeroom, use this utility to change the default homeroom for a group of selected patrons:



To change the default homeroom for a group of selected patrons:

Step 1. Select **Utilities** from the **Tools** menu.

Step 2. Select (highlight) **Patrons** from the utility **Categories** pane on the left-hand side of the **Utilities** window.

Step 3. Next, choose the **General** subcategory located directly below.

Step 4. From the **Utility Selection** pane, choose the **Replace Information** utility type.

Step 5. Under the **Selection** tab of the **Selected Utility** pane, select **Homeroom** from the **Replace** drop-down menu.

Step 6. Next, enter the name of the homeroom in the **With** drop-down menu (e.g. **Brown**).

Step 7. Next, set the **Select By** to the desired criteria (e.g. **Homeroom**, **Grade**, **Policy**).

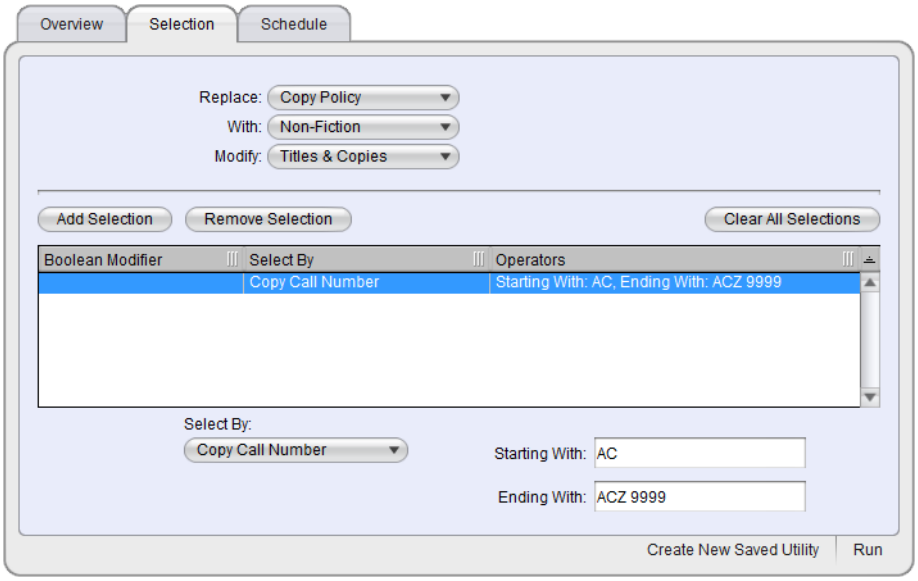
Step 8. Provide the **Starting With** / **Ending With** fields or the **From** / **Through** drop-down menus with the appropriate information (e.g. **Standard** / **System Patrons**).

Step 9. Click **Run**. Remember, if you are asked whether or not you want to archive, the answer should *always* be **Yes**.

Moving Items to a New Policy

Now you are ready to switch your items from the generic **Standard Item** policy to a more specific policy.

Performing this utility will be quite easy since you're probably using call number ranges or prefixes (such as **FIC**) as the basis for your new **Item** policies. The example pictured below demonstrates how to switch items within a specific call number range to the corresponding policy.



To switch items to a new item policy:

Step 1. Select **Utilities** from the **Tools** menu.

Step 2. Select **Copies** from the utility **Categories** pane on the left-hand side of the **Utilities** window.

Step 3. From the **Utility Selection** pane, choose the **Replace Information** utility type.

Step 4. Under the **Selection** tab of the **Selected Utility** pane; select **Copy Policy** from the **Replace** drop-down menu before setting the **With** drop-down menu (e.g. **Non Fiction**).

Step 5. Specify that you would like to **Modify** *both* **Titles & Copies**.

Step 6. Next, set the **Select By** to the desired criteria (e.g. **Copy Location**).

Step 7. Provide the **Starting With** / **Ending With** fields or the **From** / **Through** drop-down menus with the appropriate information (e.g. **Standard** / **System Patrons**). For example, if you are doing a Dewey Range, use the beginning call number and the ending call number (e.g. `000 - 099.99999`).

Step 8. Click **Run**. Remember, if you are asked whether or not you want to archive, the answer should *always* be **Yes**.

Once you have switched all your items to the new policy, statistics will be kept according to these *new* policies. Prior statistics *can not* and *will not* be changed.

Operation Management

The **Operation Management** window automatically orders/sorts *all* pending operations (i.e. reports, utilities, imports, or exports) and allows you to view summaries and open, email, or save operations that you (or others) have previously completed. Simply think of the **Operation Management** window as a nerve center that consolidates all operations that you, the current user, the system, or others (depending on your **Security** permissions), have been performing; in essence, a specialized transaction log for past and future operations.

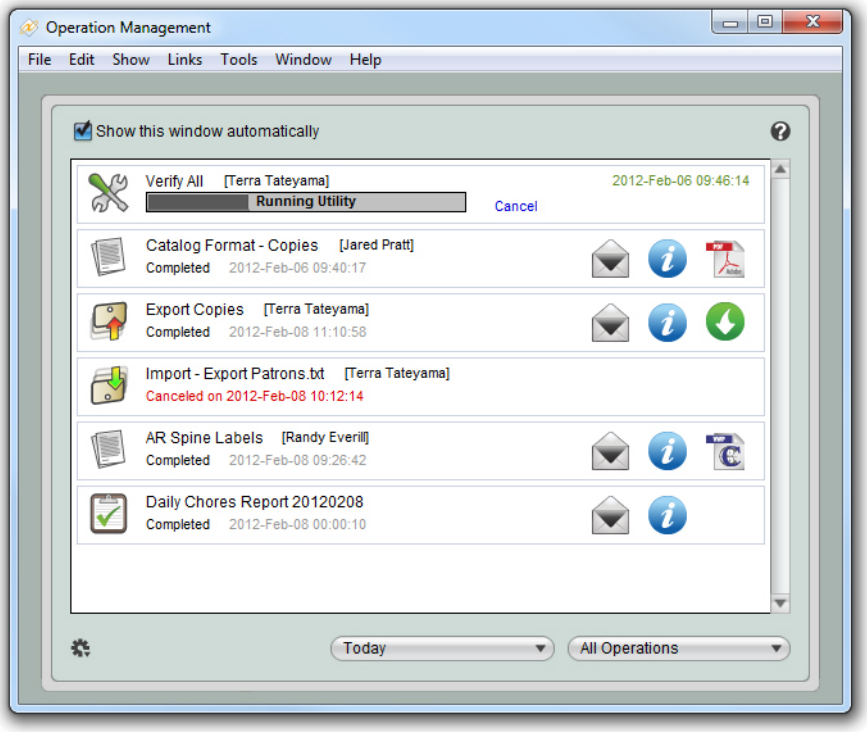
Once a report, utility, import, or export has been initiated, the **Operation Management** window will open[1], tracking the progress of the current operation and allowing you to view (or save) previously completed operations. Completed operations shown in the "queue" include the name and status of the operation and are affixed with a time/date stamp. An operation that is currently running provides a **Cancel** option.

Each time the **Operation Management** window is opened, the **Date Range** drop-down filter defaults to **Today**; in other words, only the current user's *newest* (i.e. **Today**) operations are initially visible in the **Operation Management** window's "queue". Everything in this list is ordered chronologically (newest-to-oldest in top-down order) which is helpful when trying to discover if there are any operations in the queue ahead of yours. The **Operation Type** drop-down filer defaults to **All Operations**; the **All Operations** selection includes pending (or completed) automatic system operations such as the **Daily Chores** system utility (which clears expired holds, reservations, and overdue items that were declared **Lost**).

For reasons of accountability and transparency, the **Operation Management** window will retain *all* information for canceled and completed operations for a week at least; operations older than a week can be removed from the queue by choosing one of the **Remove older than XX days** selections from the **Operation Management** window's **Actions** menu. Your **Security** privileges (i.e. **Remove All**) determine whether a particular user has the ability to remove canceled or completed operations from the queue. By default, all operations older than *ninety* days are automatically removed from the **Operation Management** window.

1.This depends on whether the **Show** this window automatically box in the **Operation Management** window is checked or not.

If the **Show this window automatically** box (located near the top of the window) is checked, the **Operation Management** window will automatically open each time you perform an operation. If this box is *not* checked, you will still be able to open the **Operation Management** window by selecting it from Alexandria's main **Tools** menu. At this point, if you would like to once again have the **Operation Management** window open automatically each time an operation is initiated, re-check this box.



The **Operation Management** window can potentially display the name and status of the operation, the user who initiated the operation, and the time/date that the operation was completed or canceled.

By default, the **Operation Management** window only provides a quick glimpse at the operations performed (or queued) by you, the current operator. If you are logged in and have the proper security permissions, you can expand the scope of the **Operation Management** window to include operations from other users (and sites) as well.

The status of an operation can be one of four things:

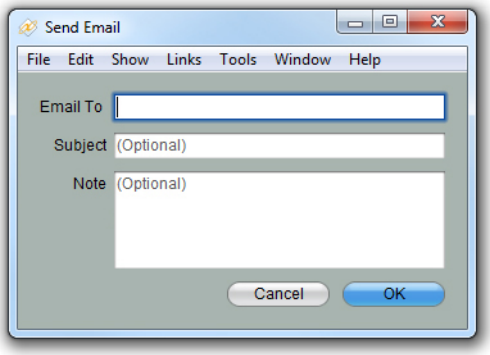
- **Running**—This status shows the operation currently being performed; it provides the progress of the operation, the date/time that the operation began, and a **Cancel** button.
- **Queued**—This status indicates than an operation is pending, but has not yet been started. The **Position: XX** text following this status indicates what place your operation has in the queuing system. Users with the proper security privileges are able to **Cancel** queued operations other than their own.
- **Canceled**—This status indicates that an operation was canceled during (or before) completion and includes a time/date stamp and the user who canceled it.
- **Completed**—The operation was completed and results are available; operators can open it, download the results, or send the results via email to whatever address they want—different from those specified in the **Locations** tab of the **Reports** window.

One of four different icons can appear to the right of each completed operation in the queue; an open **Send Email** window icon, an operation information icon, an open report icon, and a download file icon.

- **Send Email**—This opens the **Send Email** window, allowing you to send a link to download the completed operation file. The **Send Email** icon won't appear to the right of the operation until you've properly set up your **Email** settings *(see "Administration: Email Settings" on page 61)*. For more information about the **Send Email** window, see page 220.
- **Operation Information**—By themselves, completed operations display very little information in the queue; they have a completion date, operation name, and the operator who created it. Additional information for each operation (such as *'new'* or *'modified'* records, associated error messages/notes, or library codes necessary for Central Union, etc.) can be acquired by clicking this icon. If an error occurs during an operation, an alert icon will appear in the summary, informing you that you should pay special attention to the results; alerts and exceptions contained within your *PDF* are printed in red.
- **Open Report**—If an operation is a report, clicking this icon will open the saved report as an **Adobe Reader** *PDF* file.
- **Download File**—If an operation is an export, clicking this icon will spawn an operating system standard **Save As...** window, asking where you would like to download your *TXT* or *AXD* data file.

Send Email

The **Operation Management** window has integrated email capabilities. Clicking the **Send Email** button opens the **Send Email** window which allows you to send a downloadable link to the completed operation file. The **Send Email** icon won't appear to the right of the operation until you've properly set up your **Email** settings *(see "Administration: Email Settings" on page 61)*. For more information about the **Send Email** window, see page 220.



- **Email To—**Send a downloadable link to the PDF or other completed operation files by providing email addresses (e.g. *johndoe@examplelibrary.com*) in the **Email To** field; you can list more than one email address separated by commas:
  johndoe@examplelibrary.com, *janedoe@examplelibrary.com*.

- **Subject—**Use this optional field to provide brief summary of the email attachment (e.g. *Requested Barcode Laser Label Reports*); if left empty, it will send the email with the default subject line of: "*A file is available for your retrieval.*"

- **Note—**This optional field allows you to append text to the bottom of the email message.

Daily Chores

Every day, our software performs certain **Daily Chores** which clean up the system by removing expired holds, in-stock holds, and reservations, etc. At the end of each **Daily Chores** cycle, Alexandria will archive the operation(s) to the transaction log and deliver the results to the **Operation Management** window.

The **Daily Chores** operations, and other system activities, are available for viewing by *all* operators, but only some users have the **Security** privileges (i.e. **Remove All**) to remove them.

Actions Menu

The following options only appear selectable from the **Operation Management** window's **Actions** menu if you have **Remove All** selected from the in the **Operation Mgmt** drop-down menu in the **Reporting** tab of your **Security Preferences**.

By default, all operations older than ninety (*90*) days are automatically removed from the **Operation Management** window.

- **Remove older than 7 days—**This selection will immediately remove *all*' operations in the queue older than *07* days.
- **Remove older than 14 days—**This selection will immediately remove *all* operations in the queue older than *14* days.
- **Remove older than 30 days—**This selection will immediately remove *all* operations in the queue older than *30* days.
- **Remove older than 60 days—**This selection will immediately remove *all* operations in the queue older than *60* days.
- **Repeat—**Choosing this will take the selected operation (i.e. *report* or *utility*) with the original parameters, place it in the queue, and schedule it to run again as soon as possible. The ability to use the **Repeat** command depends on your **Security Group** settings; operators with the **Manage All** selected in their **Security** > **Tools** > **Operation Management** preferences *(page 67)* will be able to remove or repeat operations.

Date Range Filters

Depending on your **Security** settings, this drop-down menu can contain two sections; everything *above* the line is visible for the current user (i.e. an operator's operations) and everything *below* the line is every user's operations.

- **Today—**Filters only the operations that were performed or queued today from the **Operation Management** window.
- **Last 7 Days—**Filters only the operations that were performed or queued over the last week from the **Operation Management** window.
- **Last 30 Days—**Filters only the operations that were performed or queued over the past month from the **Operation Management** window.
- **Last 60 Days—**Filters only the operations that were performed or queued over the past two months from the **Operation Management** window.
- **All—**Shows all the operations that have been performed or queued in the **Operation Management** window during the last three months (i.e. *90* days).

Operation Type Filters

Depending on your security settings, this drop-down menu may contain two sections; everything *above* the line is visible for the current user (i.e. the operator's operations) while everything *below* the line is used to view operations initiated by *all* users.

- **All Types—**Shows all types of operations that have been performed or queued by the current user in the **Operation Management** window.
- **Exports—**Shows only the export operations that have been performed or queued by the current user in the **Operation Management** window.
- **Imports—**Shows only the import operations that have been performed or queued by the current user in the **Operation Management** window.
- **Reports—**Shows only the report operations that have been performed or queued by the current user in the **Operation Management** window.
- **Utilities—**Shows only the utility operations that have been performed or queued by the current user in the **Operation Management** window.
- **System Reports—**Shows only the system report operations (i.e. **Daily Chores**) that have been performed or queued in the **Operation Management** window.

The following **Operation Type** filters only appear if you have **View All** selected from the in the **Operation Mgmt** drop-down menu in the **Reporting** tab of the **Security Preferences**.

- **All Operations—**Shows *all* operations that have been performed or queued by *every* user in the **Operation Management** window.
- **All Exports—**Shows *all* export operations that have been performed or queued by every user in the **Operation Management** window.
- **All Imports—**Shows *all* import operations that have been performed or queued by *every* user in the **Operation Management** window.
- **All Reports—**Shows *all* report operations that have been performed or queued by *every* user in the **Operation Management** window.
- **All Utilities—**Shows *all* utility operations that have been performed or queued by *every* user in the **Operation Management** window.

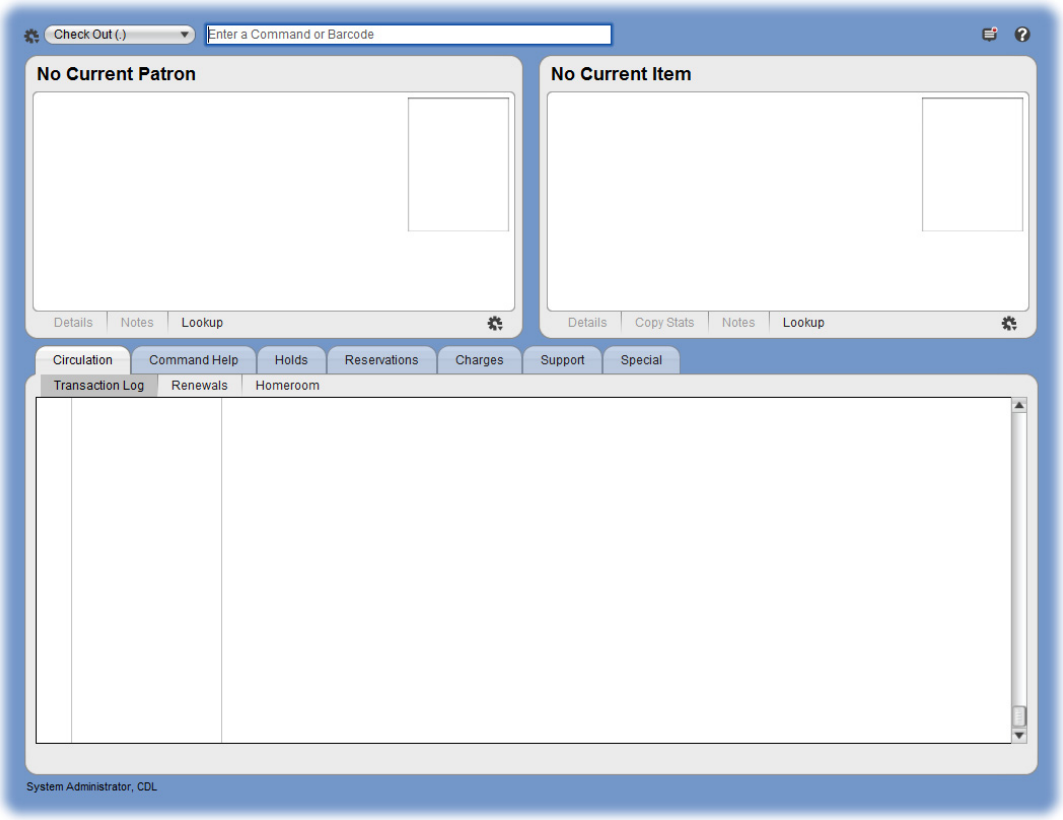
Circulation Window

Introduction to the Circulation Window

The **Circulation** window serves as Alexandria's main hub for District and/or Librarian Workstations. It's used for pretty much *everything* from performing library transactions, issuing books, placing hold requests and reservations, processing fees, fines, payments, and renewing books. You can also initiate special functions such as inventory, cataloging, record updating and viewing.

The **Circulation** window can *not* be closed while Alexandria is running; however, it can be hidden or minimized. Use one of the following methods to bring the **Circulation** window into focus:

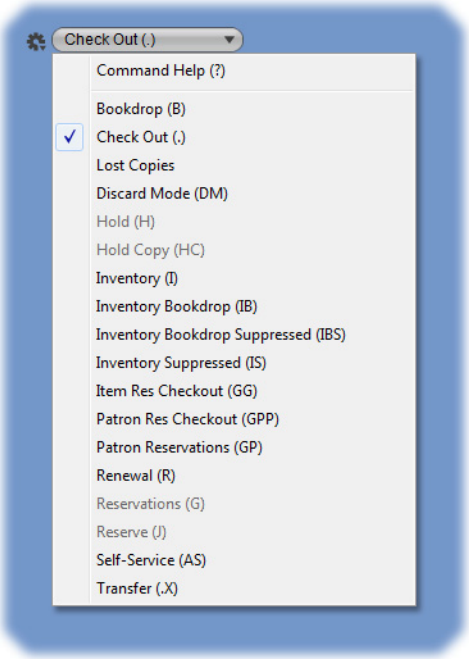
- Select **Circulation** (Cmnd/Ctrl+T) from the main **Show** menu.
- Select **Circulation** from the **Windows** menu.



Modes, Commands and Help

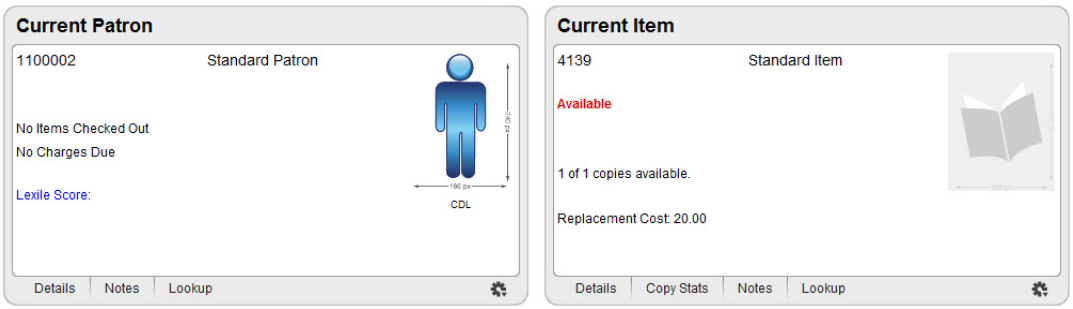
The top section of the **Circulation** window allows you to select and enter commands that apply to the active **Circulation Mode** of the command line.

- A **Circulation Mode** is simply a function for which many patrons or items are processed. For example, **Bookdrop**, **Check Out**, **Inventory**, **Hold**, and **Renew** are all *modes*.
- The **Command Line** is where you enter patron or item barcodes and/or circulation commands *(see page 235)*. If you enter *only* a barcode, the selected **Circulation Mode** (located to the left of the command line) will determine what action is performed.
- Click the round **Online Help** ("?") button at the top of the **Circulation** window to open your default web browser to the main page of Alexandria's Online Help.



Current Patron and Current Item Information

Just below the **Circulation** window's "**Modes, Commands, and Help**" section (described on the previous page) are the **Current Patron** and **Current Item** panes where general information about the current patron and current item is displayed.



- NOTE -

Most Alexandria operations depend on the current patron and/or item. For example, you *must* have a current patron to check out, hold, or reserve an item.

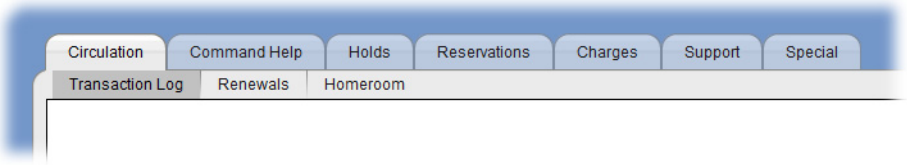
- Depending on your preference settings, the current patron section can display the patron's current Lexile score and/or Reading Level; also shown are the number of items checked out and fines or credits they have accrued.
- If available, click the **Details** button in the current patron/item panes to view detailed information about the patron/item.
- If available, click the **Notes** button in the current patron/item panes to view notes entered for a particular patron/item. Notes may be provided for a *patron* in the **Notes** tab of the **Patron Management** window *(see 271)*. You may provide notes for an *item* in the **Copy Notes** tab of the **Item Management** window *(see 251)*.

  You can also select **Show Patron/Item Details** from the **Circulation** window's primary **Actions** drop-down menu to view the same information as the **Details** button.

  Alternately, you can select **Notes** from the **Actions** drop-down menus located in the bottom-right corners of both the **Current Patron** and **Current Item** panes.
- If the **Current Item** is a title record, you can view all associated copies by clicking the **Copy Stats** subtab. This does the same thing as clicking the **Copy Stats** tab of the **Item Management** window (**Copy Information** tab; page 256).
- Click **Lookup** to open the **Patron/Item Lookup** window, respectively.

Circulation Window Tabs

The bottom half of the **Circulation** window contains a series of tabs that are helpful for daily circulation activities and the management of your library. Each tab has its own set of subtabs from and these subtabs change what is seen on the tab. To bring a particular tab into view, click on the tab; then, click on the appropriate subtab to view the desired pane for that tab.



The **Circulation** window tabs and subtabs below are comprehensively detailed in Alexandria's Online Help:

Circulation tab

- **Transaction Log**, **Renewals**, **Homeroom**

Command Help tab

- **All Commands**, **Common Commands**, **Data Manipulation Commands**

Holds tab

- **Patron Holds**, **Patron In-Stock Holds**, **Item Holds**, **Item In-Stock Holds**

Reservations tab

- **Patron**, **Item**

Charges tab

- **Charges**, **Payments**, **Refunds**, **Credits**

Support tab

- **Email**, **FTP**

Special tab

- **Status**, **System Info**, **License Information**, **Connected Clients**

- NOTE -
If you are an Alexandria operator without the necessary **Security Group** permissions to complete a required action, you must find someone who has the authority who is willing to **Log In** and permit the action.

Using the Circulation Window

This section describes how to perform basic operations in the **Circulation** window in order to complete transactions in your library.

Using the Command Line

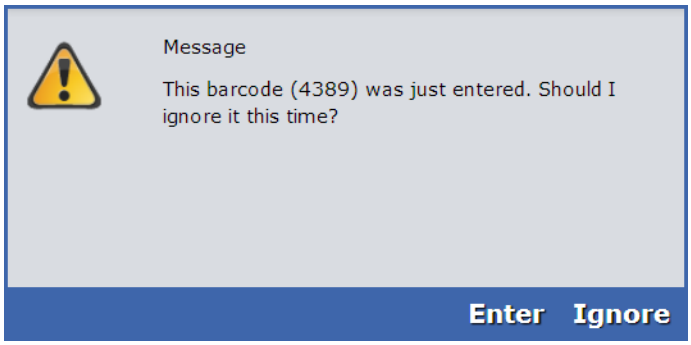
There are several ways to use the command line.

1) Enter a barcode.

You may enter a barcode manually by typing the number and pressing `<enter>`; or you may scan a barcode using a barcode reader.

When you enter a barcode, the action that takes place depends on your current **Circulation Mode** (which is displayed to the left of the command line). For example, if your current **Circulation Mode** is **Check Out (.)** and you enter barcode "`13456`", item 13456 is checked out to the current patron.

If you enter the same barcode number twice in a row, a warning message appears.



- NOTE -

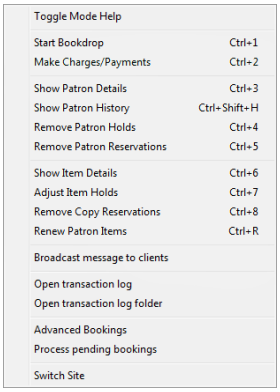
When you enter barcodes via portable scanners, Alexandria will *ignore* duplicate entries that appear side by side.

- **Enter a command and a barcode.**
  For actions other than those contained in the **Circulation Mode** drop-down menu, enter a command followed by the barcode and press `<enter>`. Doing so will apply that action to the barcode you enter. It does *not* change the **Circulation Mode**. Therefore, if you're in **Check Out (.)** mode, entering the command of "`B 13456`" performs a bookdrop on item 13456.

- **Enter a command without a barcode.**
  If you enter a command without a barcode, the current **Circulation Mode** will change. For example, if you enter "`H`" and press `<enter>`, the **Circulation Mode** is changed to **Hold**. You can then enter (or scan) a barcode for each item that you want placed on hold for the current patron.

- SHORTCUT -

An equal sign "=" is used as a shortcut for the current item barcode. For example, if you have a current patron, "`H=`" will place a hold on the current item.



Using the Actions Menu

Additional circulation commands are available from the **Actions** menu(s). These menus appear throughout the **Circulation** window. You can either select a command directly from these menus or use the hot-keys (referenced in the right-hand column of the **Actions** menu) to execute commands.

Some of the commands in these menus require a current patron or current item. For example, you *must* have a current item to select **Copy Stats**.

The **Actions** menu(s) show available commands as selectable text. For example, if the current patron does *not* have any reserves, the **Remove Patron Holds** and **Remove Patron Reservations** selections appear grayed-out in the menu and are, therefore, non-selectable.

The following commands are available from the **Actions** menu:

- **Toggle**[1] **Mode Help**—This selection toggles a real-time **Circulation Mode** help section explaining what each **Circulation Mode** does.

- **Start Bookdrop** (Cmnd/Ctrl+1)—Sets the current **Circulation Mode** to **Bookdrop** where you enter barcodes for items you want checked in. This option will toggle between **Start Bookdrop** and **Start Check In/Out** mode.
- **Start Check In/Out** (Cmnd/Ctrl+1)—Sets the current **Circulation Mode** to **Check Out (.)**. This menu will toggle between **Start Bookdrop** and **Start Check In/Out** modes.
- **Make Charges/Payments** (Cmnd/Ctrl+2)—Opens the **Charges** tab on the **Circulation** window; you may add or remove fines, accept payments for acquired fines, and issue refunds for payments made. You must have a current patron to select this mode.

- **Show Patron Details** (Cmnd/Ctrl+3)—Shows the current patron's status details; including all transactions, fines, requests, and so forth. You must have a current patron to select this option. Performs the same function as clicking the current patron **Details** button.
- **Show Patron History** (Cmnd/Ctrl+Shift+H)—Shows the current patron's complete history; including all transactions, fines, requests, and so forth. To select this option, you must have a current patron who has the **Keep Patron History** (**Statistics** tab) box checked in their patron record *(for more information, please review the "Patron Management" sections of Alexandria's Online Help)*.
- **Remove Patron Holds** (Cmnd/Ctrl+4)—Opens the **Holds** tab on the **Circulation** window and shows which items the current patron has on hold. You must have a current patron with hold requests to select this option.
- **Remove Patron Reservations** (Cmnd/Ctrl+5)—Opens the **Reservations** tab on the **Circulation** window and shows items with reservations pending for the current patron. You must have a current patron with reservations to select this option.
- **Show Item Details** (Cmnd/Ctrl+6)—Shows the current item's complete details; including the status for all copies belonging to that title. You must have a current item to select this command. Performs the same function as clicking the current item **Details** button.

1.In technical terms, toggle means "to alternate between two or more electronic, mechanical, or computer-related options, usually by the operation of a single switch, drop-down menu, or keystroke (e.g. *toggled back and forth between two windows on the screen*)."

- **Adjust Item Holds** (Cmnd/Ctrl+7)—Shows all the patrons who have placed a hold request for the current item. You can remove a patron request from the queue or change the order. You must have a current item with pending hold requests to select this option.
- **Remove Copy Reservations** (Cmnd/Ctrl+8)—Shows all forward reservations for the current item. To remove reservation requests, click on the reservation and click **Remove Reservation**. You must have a current item with reservations to select this option.
- **Renew Patron Items** (Cmnd/Ctrl+R)—Shows everything currently checked out to the current patron. Either click the **Renew All** button to renew *all* items or select (highlight) certain items to renew and click the **Renew** button. The current patron must have items checked out to select this option.

- **Broadcast Message to Clients**—A query window will appear with a text box for entering and sending messages to other Librarian Workstations connected to the main Data Station. This message will *only* appear to currently-connected clients.

- **Open Transaction Log**—This selection opens the most current **Transaction Log** in a COMPedit document, similar to entering " +++ " into the command line.
- **Open Transaction Log Folder**—If you're on the Data Station (i.e. server), this selection will open the directory where all your locally archived log data is stored.

  On Macintosh OSX machines, this folder is located in the following directory:
  Hard Drive > Users > Shared > Library > Application Support > Alexandria Support > Log

  On a Windows XP, (Librarian Workstation) machine, the log folder should be located here:
  Hard Drive *(typically C:)* **> Documents and Settings > All Users > Documents > Alexandria Librarian Support > Log**

  On Windows 7 and 8 machines or Windows Server 2008 and 2012 machines, the log folder should be located here:
  Hard Drive *(typically C:)* **> ProgramData > Alexandria Support > Log**

- **Advanced Bookings**—Every day that reservations begin, an administrator-level operator should select the **Advanced Bookings** option from the **Circulation** menu; for more information on why this should be done, review the "Advanced Bookings" section of Alexandria's Online Help.
- **Process Pending Bookings**—When you select the **Process Pending Bookings** menu option, Alexandria checks to see if any unavailable items have recently become available. If they have, they're automatically assigned to the requesting patron(s).

- **Switch Site**—This allows operators with the proper **Security Group** permissions to change sites without having to **Log Out** and then back in again; *see "Accessing a Different Alexandria Site" on page 36.*

System Patrons

There are several *system* patrons that Alexandria uses to track items with unique statuses, such as lost, archived, or out-for-repair. For example, to track items that have been lost, you would check them out to the **Lost Copies** patron (barcode 01).

Special patrons use the **System** policy, which has no restriction on the number of items that may be checked out at one time. You can check items out to system patrons just as you would with any other patron. Although System Patrons can *not* be removed, some can be modified.

Here are Alexandria's *system* patrons:

- **Lost Copies** (barcode 1)—To keep track of copies that have been lost, check them out to this patron. Unlike other assets, a copy that is checked out to the **Lost Item** patron does not have its inventory date renewed. If the copy is ever found, simply check it in and it's available for circulation again.

  If a copy is already checked out a *real* patron, checking it out to the **Lost Item** patron causes a window to appear so you can charge a fine to the patron who has lost the item. The lost copy will appear on several patron status/details reports.

  Although you may permanently remove copies from the Alexandria system when it's lost, lost copies are quite often found again later. Checking a copy out to the **Lost Item** patron makes it easier to return it to the system because you simply check the copy back in when it's found. Using the **Lost Copies** patron also makes it easy to keep track of which copies have been lost so you can order new copies.

  There are **Utilities** available to remove lost copies according to your policies and the utility selection criteria you provide.

- **Discarded Copies** (barcode 2)—To track copies in the library that are not available for circulation, but have not yet been permanently removed, check them out to this patron. To return a discarded copy back to "available," simply check it in.

  To permanently remove discarded copies, use the corresponding **Item Utility**; *for more information on checking copies out to the **Discarded Item** system patron, please review page 249 of this guide.*

- **For Library Use** (barcode 3)—To make copies available for use *only* within the library, check them out to this patron. For example, you may want to keep holiday-themed books in the library to make them more available during the holiday season. Check these copies out or place a reservation on them using the **For Library Use** patron.

- **On Repair** (barcode 4)—To track copies that are sent for repair and not available to patrons, assign them to this patron. When the copy has been repaired and returned, check them in to make them available again.

- **On Order** (barcode 5)—To keep track of items on order, add them to your collection immediately after you place your order and then issue them to this patron. Enter an override date that matches the scheduled delivery date for these items. When you receive these items, check them in to make them available.
- **Archived Copies** (barcode 6)—To archive certain copies and make them unavailable to patrons, check them out to this system patron. For example, issue items to this patron if they are kept in a special room and not generally available for circulation.
- **Unknown** (barcode 8)—Used for copies with special circumstances or whose status you do not know (e.g. items on display, set aside, or temporarily misplaced that you know aren't permanently missing).
- **In Transit** (barcode 9)—To keep track of copies that are in transit, assign them to this patron. When you receive these items, check them in to make them available.
- **System Administrator** (barcode 10)—This special operator is your system default **District Administrator**; it should never be used as a primary login—it's only there for emergencies.

Reasons For Creating Your Own System Patrons

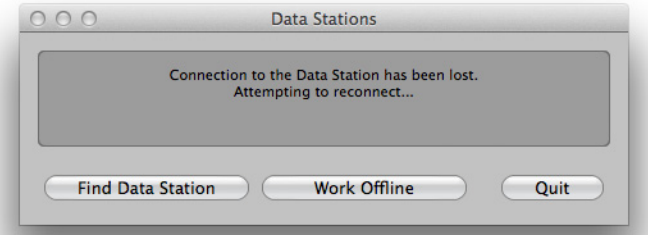
You can create and remove your own *system* patrons to track items with a unique status as needed for your library. Use barcodes 30-50 for special patrons (barcodes 20 and under are *exclusively* reserved for COMPanion use). These patrons are automatically assigned the **System** policy, which does not restrict the number of copies they can check out.

The following are examples of uses for system patrons *you* create:

- Instead of using the **For Library Use** patron to reserve holiday books, create a "holiday" patron and check out seasonal books to this patron.
- Instead of using the **On Repair** patron, create a system patron for each vendor that repairs your items. When you send an item to that vendor, check it out to them for the period of time they will have the item.
- Instead of using the **On Order** patron, create a system patron for each vendor from whom you order items (e.g. Perma-Bound). When you order items from that vendor, check them out to that vendor and enter an override date that matches the scheduled delivery date.

Offline Mode

Alexandria provides a convenient **Offline Mode** for Librarian Workstations when connectivity with the server is lost. **Offline Mode** provides additional peace of mind for operators when things go wrong, such as a network failure, especially in systems where longer network distances make failure more common.

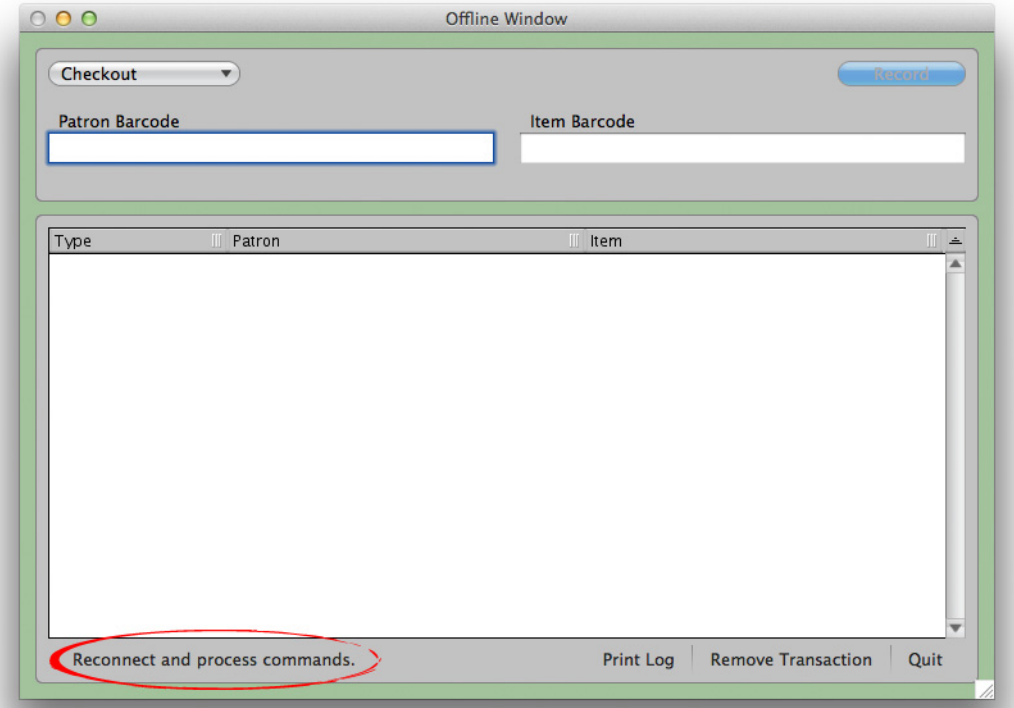


When the Librarian Workstation notices that it has lost communication with the hosted Data Station for any reason, a pop-up window appears, informing you that its connection has been terminated; this can occur during launch or during regular operation.

This window will allow you to either **Quit** so that they may try again later when communications are re-established or **Work Offline**.

If the user chooses to enter **Offline Mode**, the Librarian Workstation will transform itself into a greatly simplified version of the main **Circulation** window. The Librarian Workstation will remain in this mode until communications are re-established.

The **Offline Window** only allows you to perform a few "safe" procedures: **Check in**, **Checkout**, and **Inventory**. Menu commands are disabled to block any external access outside of the **Offline Window**; the transaction log remains, although little is displayed—without a connection to the Data Station, there is no way for Librarian Workstations to validate the current item/current patron via their barcode.



However, in order to reduce potential errors during offline operation, the **Offline Window** allows you to specify what you are scanning/entering by supplying a **Patron**/**Item** entry line and a command drop-down menu (**Check in**/**Checkout**/**Inventory**).

The **Checkout** mode is the *only* selection that allows the **Patron Barcode** field; the **Check in** (i.e. **Book Drop**) and **Inventory** modes do not require patron record information.

As transactions are entered into the **Offline Window**, they are recorded to a separate **Offline Transactions** log, stored in an **Offline Transactions** file, kept in the local **Alexandria Support** folder. The information in this log is adapted and transferred to the Data Station when online connectivity is reestablished.

When the hosted Data Station is detected again, the **Offline Window** will inform you and allows you to exit **Offline Mode**. As you exit **Offline Mode**, the Librarian Workstation parses through the **Offline Transactions log** and sends outstanding commands to the Data Station as if you had imported them using the existing **Import Transaction Script** utility *(these features are discussed more comprehensively in Alexandria's Online Help)*.

As each transaction is processed, they are removed from the **Offline Transactions log**, until there are none remaining. Transactions will be moved to the standard Alexandria **Transaction log** as they are processed while unprocessed transactions remain in the **Offline Transactions log** in case the Librarian Workstation loses communications with the hosted Data Station during the procedure.

Notes:

Circulation Commands

Circulation Command Basics:

When typing (rather than scanning) barcodes, always follow the barcode with an <enter>.

Make a Patron Current

Command: `P {patron barcode}`

Make a Patron Current—Use this command-line combination to make a specific patron the current patron. For example, to make a student with the barcode 100 the current patron, enter "P100". This command is useful if you have an overlap in patron and item barcode numbers. Unless you specify otherwise, Alexandria will *always* check to see if the barcode belongs to an item before a patron.

If an existing patron barcode is the same as an existing item barcode, always put a "P" in the command line before scanning the barcode to specify the patron. However, COMPanion *strongly recommends* that you change either the patron or item barcode to avoid these potential conflicts.

Make an Item or Patron Current

Command: `X {barcode}`

Make a Patron or Item Current—Use this command (followed by barcode) to make an item or patron current. For example, "X200" makes a patron with the barcode 200 the current patron and "X110034" makes an item with barcode 110034 the current item. If you enter an "X" without a barcode, current item and patron are cleared and the main **Circulation** window is reset to **Check In/Out** mode.

Check Out (.)

Alexandria makes it easy to check items in and out by automatically determining whether a barcode you enter belongs to a patron or an item and whether that item is already checked out. Because of this, Alexandria can usually deduce the appropriate course of action.

In addition, as you are performing transactions, Alexandria automatically computes the proper due dates, adjusts for closed dates, verifies policies, and collects statistics.

- NOTE -
You can use the equal sign as a substitute for the barcode of the current item in *any* command. For example, if the current item is 3000, then "`H=`" is the same command as `H3000`.

Step-by-Step: Checking Items Out

Use the following steps to check an item out.

Step 1. Make sure the **Circulation Mode** is set to **Check Out** (`.`).

Step 2. Scan (or type) the barcode of the patron who is about to check an item out. This makes the patron current. If you do not know the patron's barcode, use the lookup command to locate the patron and their barcode *(see page 240)*.

Step 3. Respond to any circulation alert messages that appear.

Step 4. Alexandria calculates the item due date based on your **Policies**. To enter a different due date, use the **Set Override Date** command *(see page 238)*.

Step 5. Scan (or type) the barcode(s) of the copy(s) you want to check out to the current patron. As you check copies out, they become current and appear on the **Circulation** window; a line will be added to the transaction log to show which copies have been checked out.

Special Conditions When Checking Out Items

What the **Check Out** mode does depends on two things: the **Check Out Options** preference (which allows you to change the behavior of **Check Out** mode; see page 136) and the status of the patron and item. If the item is available, it will be checked out to the current patron when scanned. If the item is already checked out to the current patron, it will be *checked in* when scanned. If the item is currently checked out to a different patron, you will be asked to either check it in from the other patron and then out to the current patron or leave it checked out to the other patron.

As you are checking items out, Alexandria will alert you to special conditions that may affect circulation.

For example, if you enter the barcode for a book that is already checked out, you can choose to check the book in, or cancel the request to check it out.

If checking an item out to a patron violates a set policy, Alexandria will alert you. For example, if a patron exceeds the number of items they can check out or exceeds the overdue limit, a warning will appear. If more than one policy setting is violated, multiple messages will appear in a single window.

If you have the authority to override policies[1], the window will include the **Override** option. You can allow the patron to check the item out (even though it exceeds the specified limit) or **Cancel** their request to check it out. If you don't have the authority to override policies, a warning message will appear, and you are left *without* the option to override or check out the item to the patron.

You can decide to check the copy in instead of overriding the policy problem.

If the barcode you enter is not assigned to an existing item (and is not part of the temporary barcode range defined in your preferences), the **Unknown Barcode** window appears.

You can choose **Ignore Barcode** if you entered it incorrectly, or you can add an item "on the fly".

If a copy is designated as an in-stock hold for another patron, an error message will appear. If you have the **Security** preference-controlled authority, **Cancel** / **Override** buttons will appear at the bottom of the window. Clicking **Override** will check the copy out to the current patron and place the student with the in-stock hold back at the top of the hold queue. If you don't have any authority, no override options will be available and item checkout will be denied.

Step-by-Step: Checking Items In

Use the following steps to check an item in:

Step 1. Scan (or type) the barcode of the item you are checking in. If you are checking-in a great many items, use the **Bookdrop** mode described on page 239.

Step 2. If the item is already checked out to the current patron, it will be checked in (upon user-verification) when scanned.

1.The **Circulation Override** setting is located in the **Circulation** tab of your **Security** preferences *(see page 65)*.

Set Override Due Dates

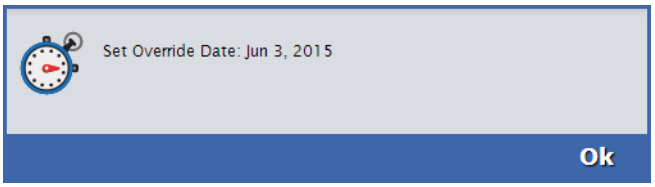
Command: `.{date}`

Set an Override Date—Typically, due dates are computed based on the policies you define in your preferences. Use this command to set a specific (or different) due date for items you are checking out, bookdropping, or performing inventory on. For example, to set the due date to June 3, 2015, type "`.Jun 3 2015`" (including the period) and press `<enter>`.

Until you clear or reset the due date using either "`.`" or "`x`", the following changes will be performed:

- The **Override Date** you set is shown to the right of the command line.

- An entry will be made to the transaction log, documenting that this date was manually set.



- Books you check out will be due on June 3, 2015.
- When you bookdrop, the system will record the book as having been checked in on June 3, 2015.
- When you perform inventory, the inventory date used will be June 3, 2015.
- When you are in **Statistics (Y)** mode, this date is used.

The **Override Date** you set is in effect until you clear it. To clear an **Override Date**, type a period into the command line without a date. The "`.`" command will also clear any special **Circulation Modes** (such as **Bookdrop** or **Inventory**) that are in effect. The period command "`.`" without a date is a quick way to reset the **Circulation** window to **Check Out** mode.

Checking out items using an **Override Date** forces them to be due on the day provided, regardless if that date is **Closed** in your **Calendar Preferences** *(see "Calendar Preferences" on page 95)*.

Step-by-Step: Set an Override Date

To set an override date:

Step 1. First enter the desired **Circulation Mode**.

Step 2. Then type "`.MMDDYY`" (or "`.MM/DD/YYYY`" or "`.M/D/YY`", etc.) and press `<enter>`.

To clear an override date:

Step 3. Type "`.`" and press `<enter>`

Bookdrop Mode (B)

Command: `B {optional barcode}`

Using Bookdrop Mode—Use this command to bookdrop items for one or for many patrons. In **Bookdrop** mode, all item barcodes you scan (or enter) are checked in. This allows you to return a large number of books at the end of the day, week, month, or year.

While in **Bookdrop** mode, Alexandria assumes you are only checking items in. If you type or scan a barcode for an item that is *not* checked out, an error message will appear in the transaction log. If you enter a patron barcode, Alexandria switches to **Check Out** mode and makes this patron the current patron.

Step-by-Step: Bookdrop an Item

To check in a single item:

Step 1. To check in an item, type "`B`" in the command line followed by the copy barcode number and press `<enter>`.

To check in multiple items:

Step 1. Enter **Bookdrop** mode by typing "`B`" and pressing `<enter>`, or choosing **Start Bookdrop** (Cmnd/Ctrl+1) from the **Actions** menu. You can also select **Bookdrop (B)** from the drop-down menu to the left of the command line.

Step 2. If different than today's date, set an override date *(page 238)* for the date the copies were returned.

Step 3. Scan (or type) the barcode(s) of the copies to check in.

Step 4. Respond to any circulation alerts that appear.

Step 5. When finished with the bookdrop or override date modes, clear them by typing "`.`" and pressing `<enter>`.

Additional Circulation Commands

Use these commands to locate patrons and items for which you don't know the barcode number. For example, if you want to check a book out to a patron, but you don't have that patron's barcode number, you can use the lookup command to find that patron by name.

When you enter a locate command, a **Lookup** window appears starting with the patron or item that is the closest match to the last name or the title you specified. When you select a patron or item from this window, they become the current patron or item in the **Circulation** window.

Locate a Patron by Last Name (L)

Command: `L {patron last name}`

Locate a Patron by Last Name—Use this command to locate a patron by last name and make them the current patron. For example, to find a patron with the last name Smith, enter "`L SMITH`". You only need to provide enough of the last name to get to the general area on the **Patron Lookup** window (e.g. `Smi` for Smith). Use the up and down **More** arrow buttons to reveal patron records *before* or *after* the selected search result.

Step-by-Step: Locate A Patron

To look up a patron by name:

Step 1. Either select **Lookup** from the **Actions** menu (in the **Current Patron** pane) or type "`L`" in the command line.

Step 2. In the **Lookup** window, type the student's last name and press `<enter>` or **Go**.

Step 3. Highlight (select) the correct name and press `<enter>`, click the **Select** button, or double-click on the correct name from the results list.

Locate an Item by Title (T)

Command: `T {title}`

Find Item by Title—Use this command to search for a copy by title (or a portion of the title). For example, to locate a title beginning with *Foundation*, type "`T foundation`" and press `<enter>`. The **Item Lookup** window appears, starting with the title in your collection that most closely matches the information you supplied.

Step-by-Step: Locate An Item

To look up an item by title:

Step 1. Either select **Lookup** from the **Actions** menu (in the **Current Item** pane) or type "`T`" in the command line.

Step 2. In the **Lookup** window, type the first part of the title and press `<enter>` or **Go**.

Step 3. Highlight (select) the correct title and then `<enter>`, click the **Select** button, or double-click on the correct title from the results list.

Placing a Hold Request on a Title (H)

Command: `H {item barcode}`

Placing a Hold Request—Use the "H" command to place a hold on an item for the current patron or to activate **Hold** mode.

To hold an item for the current patron, type "H" and then type (or scan) the item's barcode number and press <enter>.

If you do not know the item's barcode number, locate it using the **Item Lookup** "T" command.

To start **Hold** mode, type "H" and press <enter>; a current patron is required. A hold request is placed on each item whose barcode number you type (or scan) while in **Hold** mode. To exit **Hold** mode, type (or scan) a new patron barcode number or use the "X" or "." command.

- Holds are against a single item record. If one copy of that title is available, the hold becomes an in-stock hold awaiting patron pick up.
- If a hold is placed on a title that has available copies, the hold will be converted to an in-stock hold on a specific copy.
- In-stock holds are removed when the copy is checked out. Checking out a different copy of the same title does *not* remove the in-stock hold.

- NOTE -
An equal sign "=" is used as a shortcut for the current item barcode. For example, if you have a current patron (and item), "H=" will place a hold on the current item.

Step-by-Step: Place A Hold

To place a hold on an item:

Step 1. First, scan (or type) the patron's barcode to make the item current.

Step 2. Next, use the **Lookup** command "T" and, from the **Lookup** window, enter the name of the title.

Step 3. Select the correct title from the **Item Lookup** window by double-clicking on the name or by highlighting the correct title and pressing <enter> or clicking the **Select** button.

Step 4. Finally, type "H=" <enter> in the command line, followed by <enter>; this will place a hold on the current item for the current patron.

Place a Forward Reservation on a Specific Copy (G)

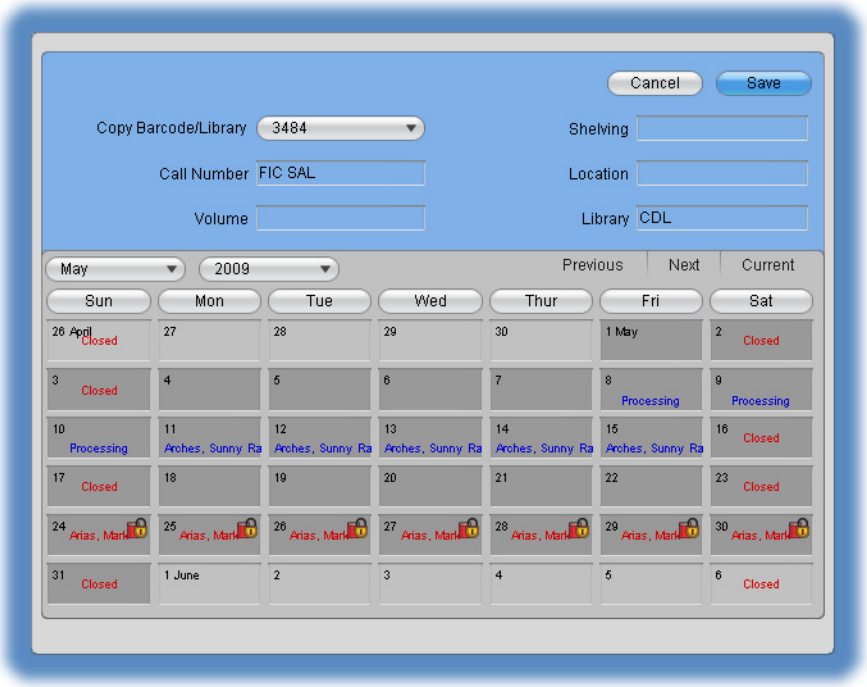
Command: `G {item barcode}`

Place a Reservation—This command allows the current patron to place a reservation on an copy; it also activates the **Reservation** mode.

- To place a reservation on an copy (with a current patron), type "`G`" and then type (or scan) the barcode of the copy; press `<enter>`. If you do not know the copy's barcode number, locate it using the **Item Lookup** "`T`" command *(see page 240 to review)*.

- To activate **Reservation** mode, type "`G`" and press <enter>. A reservation for the current patron is placed on *every* copy whose barcode you type (or scan) while in this mode. To exit **Reservation** mode, enter a new patron barcode number or use the "`X`" or "`.`" command.

- When you enter the "`G`" command, Alexandria opens a calendar window; mark the days for which you would like a reservation placed (for the current patron). Although it can be adjusted, the calendar always opens to the current month.



You may *not* make reservations on days marked with the lock icon.

Here's how the reservation calendar marks days:

- Days that the library is closed show the word **Closed** in red. The example on the previous page shows the library is closed on Saturdays and Sundays.
- Days that have existing reservations are marked with a locked book icon. The barcode number or name of the patron who has the copy reserved for that day that will be shown in *red*. Copies that are checked out or have in-stock holds placed on them are also shown in *red*. New reservations will be shown as *blue*.
- You may select different months or days or select another copy of the title (if available) from the drop-down menu in the upper left-hand side of the calendar.
- If the copy you are trying to place a reservation on is currently overdue, it will be shown as *red* in the middle of the calendar day and prefaced with an asterisk. Only the days *after* a copy is due back will be marked as overdue.

NOTE:
Make sure the reservation dates are correct before you save. They cannot be changed later. To change dates, you must delete the incorrect reservation and place a correct one.

To make a reservation for the current patron, click on the day (or click and drag across multiple days) for which you'd like to reserve the copy. Days you select will be marked with the patron's barcode number or name in blue. To omit a day you have mistakenly selected, click on it again.

You can select any available days as long as you don't exceed the number of days allowed in your patron and item policies *(see "Policy Preferences" on page 99)*. If preferences allow, you can select closed days on which to start and end reservations.

When you have selected your reservation days, click **Save**. You can make more than one reservation on the calendar for the same or multiple copies.

Use the **Cancel** button if you want to exit the calendar window without placing a reservation.

To print reports for copies with reservations, select the **Circulation** category from the **Reports** window followed by the **Reservations** subcategory. Using the **Selection** tab options for the **Reservations** report, you can specify which reservations to print *(see "Selection tab" on page 193.)*.

- NOTE -
Reservations are for specific copies on specific days. Only the patron who placed the reservation can check out *that* copy during the reservation period.

Step-by-Step: Create Forward Reservation

To create a forward reservation:

Step 1. First, scan (or type) the patron's barcode to make them current.

Step 2. Next, type "G" and then scan (or type) the barcode of the copy on which to place the reservation.

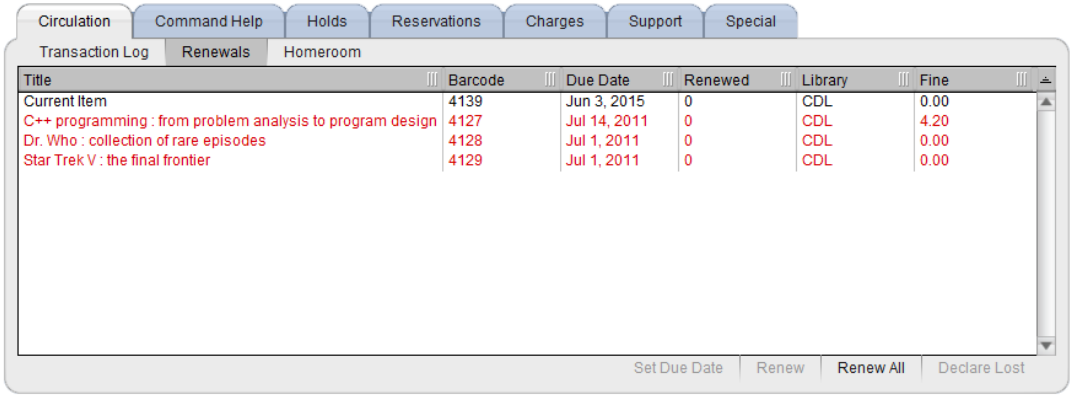
Step 3. Select (highlight) the dates for which the patron would like to place a reservation on that copy.

Step 4. Click **Save** when finished.

Renewing An Item (QE, R, or RA)

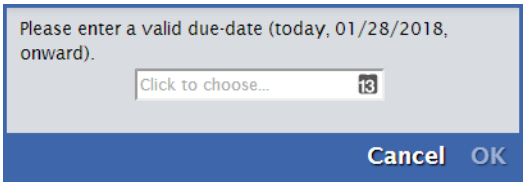
Command: `QE`

Opens the Renewals tab—To view renewal options for the current patron, type "`QE`" in the command line and press `<enter>`, or choose **Renew Patron Items** (Cmnd/Ctrl+R) from the **Actions** menu. These commands will open the **Renewals** subtab of the **Circulation** window's main **Circulation** tab, containing a list of *all* the books checked out to the current patron; hence, you may choose which books to renew or declare lost (both are also menu options).



The **Renew All** button will fail to renew items that have holds placed on them if your policy preferences specify that renewing items with holds is disallowed. If you want to override this and renew them all anyway, highlight (select) all of the items by clicking on the first item in the list while holding down `<shift>` and then proceed to click on the last item in the list. Then, click the **Renew** button. The renew option will trigger the appropriate override dialogs and allow an authorized operator to override them as desired.

- **Declare Lost—**Any selected (highlighted) items will be assigned to the **Lost Copies System Patron** and then registered as lost.
- **Renew All—**Renews *all* of the items the current patron has checked out.
- **Renew—**Renews one item at a time; also renews a range of selected (highlighted) items.
- **Set Due Date—**This function is sometimes referred to as an override date. An override date replaces the default due date normally used by the system.



Renewing an Item

Command: `R {item barcode}`

Renewing an Item—Use this command to renew an item or activate **Renew** mode. You can specify the number of times an item can be renewed in your **Policies** *(see "Policy Preferences" on page 99)*.

To renew an item:

- If the copy is physically present, type "`R`" and scan (or type) the item barcode number and press `<enter>`. If your **Policies** allow, this copy is renewed to the patron who has it checked out. That patron also becomes the current patron.
- If you do not know the item barcode (or the item is not present), enter the patron's barcode number and press `<enter>`. Then, type "`QE`" and press `<enter>`. Select (highlight) the item to renew from the list and click on the **Renew** button from the **Renewals** subtab of the main **Circulation** window's **Circulation** tab *(page 226)*.
- To start **Renew** mode, type "`R`" and press `<enter>`. All item barcodes you scan (or type) while in this mode are renewed. To exit **Renew** mode, enter a patron barcode number or use the "`X`" or "`.`" command.

If renewal is not allowed, you will be informed by Alexandria. A renewal is not allowed when your **Policies** are set to refuse renewals or when renewing an item would take it into a reserved date range.

Renew All Items

Command: `RA`

Renewing an Item—When you have a current patron, this command renews *all* the items checked out to that patron. The **Renew All** command is different from the **Renew** command in that it overrides *every* policy restriction *except* for a renewal with a hold on an item.

Step-by-Step: Renew All

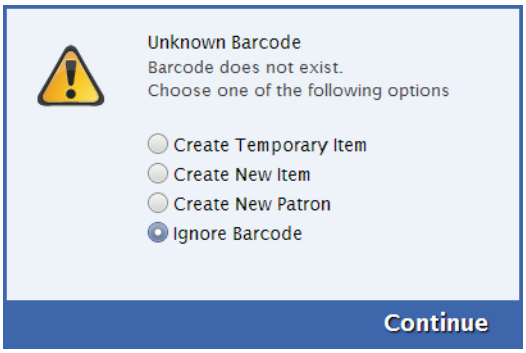
To renew items:

- If you do not know the item barcodes (or the items are not physically present), enter the patron's barcode number and press `<enter>`. Then, type "`QE`" and press `<enter>`. Select (highlight) only the items you wish to renew from the list and click on the **Renew** button from the **Renewals** subtab of the main **Circulation** window's **Circulation** tab.
- Or, if the items are not present and the patron wishes to renew *all* their copies, type "`RA`" into the command line of the main **Circulation** window followed by the patron's barcode number and press `<enter>`. This will automatically renew *all* items checked out to that patron.
- Alternately, you may click the **Renew All** button from the **Renewals** subtab of the main **Circulation** window's **Circulation** tab to renew *all* copies.

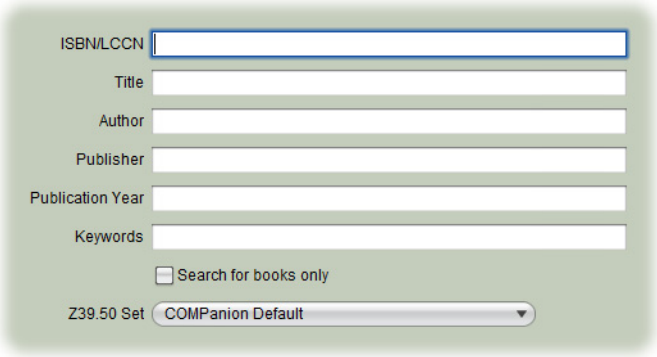
Adding Items "On the Fly"

To add an item "on the fly":

Step 1. Place a barcode label on the item and type (or scan) the item barcode number. The following window will appear:



Step 2. Click on **Create New Item**. The **Title Assistant** window will appear. Make sure the title record you are trying to update contains at least some information in the following fields: **Title**, **Author**, and **ISBN/LCCN**. See Alexandria's Online Help for more information on how to use the **Title Assistant** window.



Step 3. In the **Item Management** window, provide all the information you desire. The minimum requirement for new titles are: **Title**, **Barcode**, **Medium**, and **Policy**. Of these fields, *all* but **Title** are defaulted; titles may be added with or without copies.

Step 4. Click the **Save** button in the upper-right corner of the **Item Management** window.

Special Circulation Commands

Charging a Fee (F)

Command: `F`

Fee Charges and Payments—To view charges and payments or refunds and credits for the current patron, type "`F`" in the command line and press `<enter>`, or choose **Make Charges/Payments** (Cmnd/Ctrl+2) from the **Actions** menu. These commands will open the **Charges** tab of the main **Circulation** window.

> **- NOTE -**
>
> To charge a patron for a damaged book after it has been checked in, use the "`F {fee amount} {comment/description}`" command in **Circulation** window with a current patron. For example, if patron `1621` bookdropped a damaged item, the librarian can later enter patron `1621` into the **Circulation** window and fine them a $5.00 fee by typing "`F 5.00 Charles scribbled in index`" into the command line.

Command: `F {fee amount} {comment/description}`

Charging a Fee—Use the "`F`" command followed by a dollar amount and optional comment to issue a charge against the current patron. For example, to charge a $4.50 fee for the library Reading Club membership, type "`F 4.50 Reading Club`" and press `<enter>`.

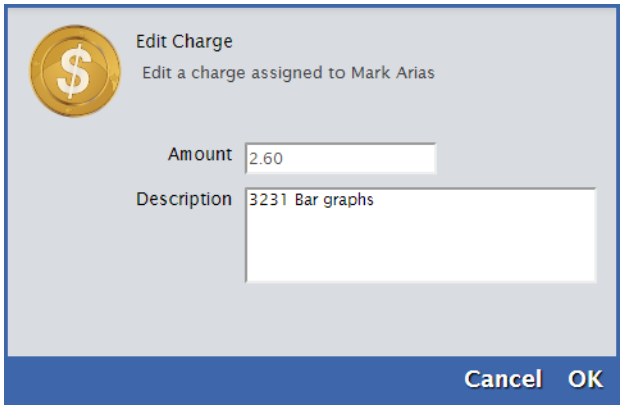
Step-by-Step: Charging A Fee

To charge a fee:

Step 1. Make the patron current by typing or scanning the patron's barcode (or by using the **Patron Lookup** "`L`" command to locate the patron by last name).

Step 2. Next, type the **Fee (F)** command, followed by the fee amount and an optional description of the fee; press `<enter>` (e.g. `F $3.00 Water damage on item 3027`).

Step 3. Once you charge a fee, you can edit it if you made a mistake. In the **Charges** mode (and tab) of the **Circulation** window, select (highlight) the charge from the list and click on the **Edit Charge** button. You can modify either the fee **Description** or the fee **Amount** (except on overdue fees which are still accruing).



Declaring a Copy Lost

Use the **Lost Copies** system patron to flag copies for later removal. Use this feature at the end of the year when you must account for how many assets were lost and their total accumulated worth.

When an item that is checked out to a patron is declared **Lost** (i.e. checked out to the **Lost Copies** patron), the **Lost Book Charge** window appears, allowing you to fine the patron who has lost the item.

Step-by-Step: Declare An Item Lost

To declare an item lost:

Step 1. While in **Check In/Out (.)** mode, type **1** in the command line and press <enter>.

Step 2. The **Lost Copies** patron will appear as the current patron.

Step 3. Type the barcode of the copy that was lost. Remember to press <enter> after each barcode.

Step 4. If a lost copy is still checked out to the offending patron, you don't need to bookdrop the item first—just check it out to the **Lost Copies** system patron.

Step-by-Step: Charge A Lost Item Fee

Use the following steps to charge a **Lost** item fee:

Step 1. The **Total Patron Fines Due** is pulled from the item copy **Replacement Cost** (from the **Item Management** window) field or your **Default Replacement/Purchase Value** policy field. You may enter any additional charges or processing fees in the **Additional Charges** field.

Step 2. If applicable, enter a portion of the accrued fine or lost book charge to be forgiven in the **Forgiven Amount** field.

Step 3. If the current patron has a credit balance on their account, you may choose to make a payment against the fee **From Credit**. If credit is available, the **From Credit** field becomes modifiable and their current credit balance is shown between the parentheses.

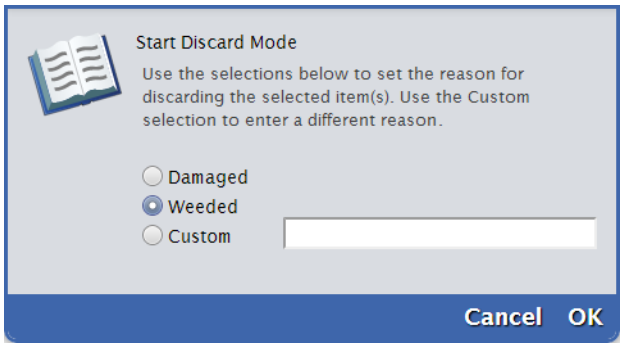
Step 4. If you provide a **Payment** amount, the **Payment Method** drop-down menu becomes selectable; you may then choose from **Cash**, **Check**, **Charge**, or **Other**.

When you are satisfied with the fee you have charged, click the **Charge Fine** or **Charge Fine and Print Receipt** buttons to charge the fee and print an optional receipt. These receipts can either be given to the patron at time of charge or filed by the library for safekeeping. If you would like to forgive the current charge (plus any additional amounts)—minus the amount of payment—click **Forgive Fine**.

Checking Items Out To the Discarded Copies System Patron

Use the **Discarded Copies** system patron to flag copies for later removal. Use this feature at the end of the year when you must account for how many copies were discarded and their total accumulated worth.

When checking an item out to the **Discarded Copies** patron (barcode 2) you are allowed to indicate the reason for the item's disposal.


Start Discard Mode
Use the selections below to set the reason for discarding the selected item(s). Use the Custom selection to enter a different reason.
Damaged
Weeded
Custom
Cancel
OK

You may choose three different options from the drop-down menu of the **Discarded Item Window**. Click **OK** or press `<enter>` when the correct reason for item's disposal is selected.

- **Damaged—**If the damaged item *is not* checked out to a patron, you may check it out to the **Discarded Items** patron (System Patron #2) with the reason being **Damaged**. Nothing will happen to the item other than it is marked as "`Discarded-Damaged`". This is similar to declaring an item—that was *not* checked out to a patron—as lost.

  However, if the damaged item *is* checked out to a patron and is then checked out to the **Discarded Copies** patron without being checked in first, then the **Discarded Items Window** will change and display the item's **Replacement Cost**, allowing you to charge a fine for the patron who last borrowed the book (and presumably damaged it). Clicking on **Charge Fine and Print Receipt** or **Charge Fine** will fine the offending patron and place a note in the transaction log. However, you may also choose **Forgive Fine** if you do not wish to charge the offending patron for the replacement cost.

- **Weeded—**If you are removing a certain book (or series of books), this option will check books out to the **Discarded Copies** system patron and assign the disposal reason as "weeded".

- **Other—**Selecting this option allows you to add a short piece of descriptive text that specifies the reason for the item's removal. These user-specified reasons will be displayed when you perform the **Discarded Copies** report. Providing definitive reasons such as "outdated," "worn out", or "no longer used", allows you to print a **Reordering Details** report which will assist you in reordering items that have been discarded, but need to be replaced.

Step-by-Step: Discarded Copies

To declare an item discarded:

Step 1. While in **Check In/Out (.)** mode, type **2** in the command line and press <enter>.

Step 2. The **Discarded Copies** patron will become the current patron.

Step 3. Scan (or type) the barcode of the copy to be discarded. Remember to press <enter> after each barcode if you are typing the barcode.

Step-by-Step: Removing Lost or Discarded Copy Utilities

Use **Utilities** to permanently remove all **Lost** or **Discarded** items after you have run the necessary reports.

Step 1. Select **Utilities** from the main **Tools** menu.

Step 2. Click on the **Copies** category.

Step 3. Select either the **Remove Lost Copies** or **Remove Discarded Copies** utility.

Step 4. If you wish, limit which copies to remove using the **Select By** drop-down menu options under the **Selection** tab.

Step 5. Click the **Run** button to perform the utility.

- NOTE -
As with *every* utility, perform an **Archive** of your **Data** file prior to running the utility to remove all discarded or lost items.

Item Management

This chapter provides a brief overview on how to manage the assets in your library.

- CENTRAL UNION -
In a Central Union, all libraries share title information, thus, all other libraries can view the changes you make. However, depending on your **Site Access** settings, you may only be able to modify *your* site's title statistics and copy information. If the union site record is selected in the **Site Access** window (or you are a **District Administrator**) you are allowed to view and edit *all* database information across all collections. If not, you will be limited to the sites for which you have access. To find out more about the **Site Access** menu and corresponding window, please review the Central Union sections in Alexandria's Online Help.

About MARC records

All Alexandria item data is saved in MARC[1] (**MA**chine-**R**eadable **C**ataloging) record format, the standard for bibliographic data around the world. If you don't know MARC standards, Alexandria has a simple editor that lets you view and edit MARC data without *any* technical MARC knowledge.

For those who are familiar with MARC standards, our powerful **MARC View** editor is available for correcting your data. You can switch between the two editors using an **Actions** menu selection or the (Cmnd/Ctrl+M) keystroke.

Although it's hidden from view, Alexandria saves additional information in the MARC record for library automation duties. This information is Alexandria-specific and is not shown in the MARC editor. However, if you export data to transfer into another Alexandria Data Station or COMPanion product, the export functions *will* include this Alexandria-specific information.

The MARC standard is complex and ever-changing; there may be perfectly valid information in your MARC records that goes unused by Alexandria. It may be that newer versions of Alexandria will use this data, so it's carefully stored with the rest of the MARC information. If you have MARC information that you'd like Alexandria to acknowledge, send a written request to:

```
Alexandria MARC Suggestions
COMPanion Corporation
1831 Fort Union Boulevard
Salt Lake City, Utah 84121
```

Or, send an email to: "ideas@companioncorp.com"
Your request will be taken into consideration and you'll receive a response.

1.To learn more about MARC tags and subfields, visit the Library of Congress' website: http://www.loc.gov/marc/

Item Management Window

To open the **Item Management** window, select **Items** (Cmnd/Ctrl+I) from the main **Show** menu.

Alexandria creates and updates MARC records in your database with the information you provide in the **Item Management** window. Everything that circulates (books, magazines, multi-media, etc.) is accessible and modifiable through the **Item Management** window.

The term "item" can also mean "asset", "title", "issue", or "copy" depending on the context. An item can be a book, video, filmstrip, newspaper, or any other form of media in your collection and each "title" can have multiple "copies".

- **Title Information** consists of data that is *identical* for all copies of a particular item, including author, publication, and notes.
- **Copy Information** consists of data that is specific to any single copy.

Switching from the **Item Management** window to the **Circulation** window makes an item current in the **Circulation** window. Vice versa, if you have an item current on the **Circulation** window and activate the **Items** window, that item's record information will be displayed.

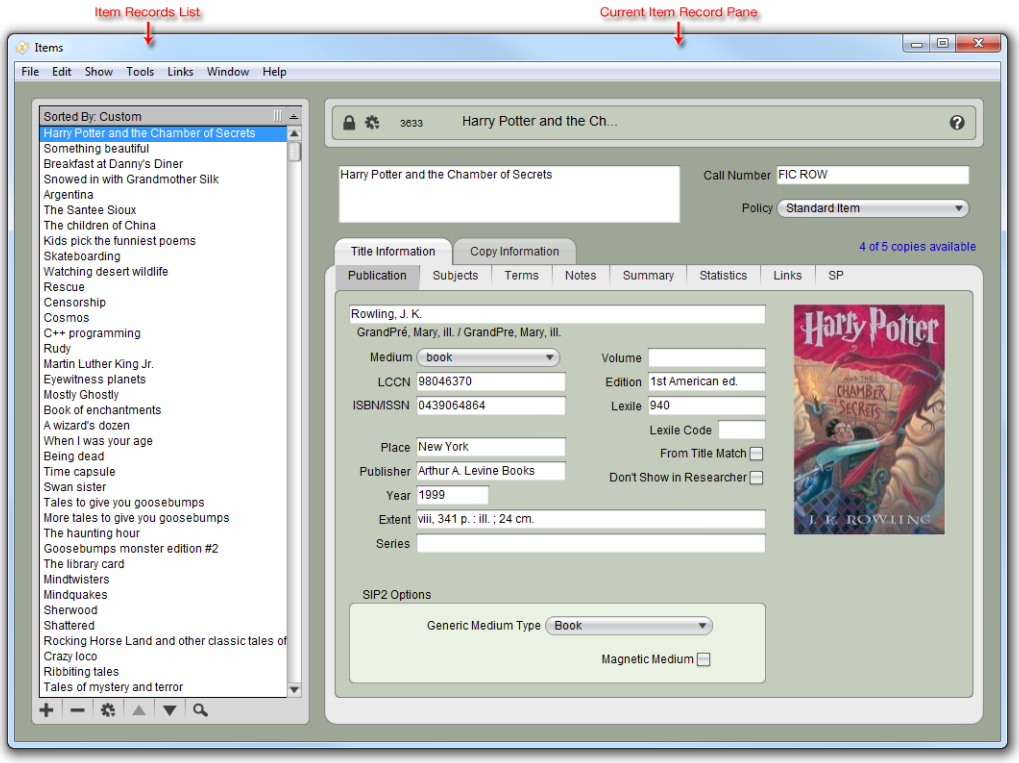
If there is no copy record in the Current Item pane of the **Circulation** window when the **Item Management** window is opened, the default selection will always be the last fifty modified titles. If your database contains *no* item records, COMPanion will always offer a sample record—the *Alexandria User's Manual*. If the **Item Management** window is opened while the <Alt>/<Option>-key is depressed, the default selection will be the last fifty titles added to Alexandria, ordered by **Title Sequence #**.

The Item Management Window In More Detail

The **Item Management** window is divided into two distinct sections:

The left-hand side of the **Item Management** window belongs to the **Item Records List** and related tools.

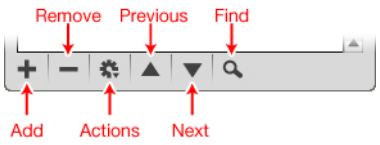
The larger, right-hand portion of the **Item Management** window consists of the **Current Item Record** pane where the selected item record is displayed, in full, along with associated tools that help perform operations on said record.



Item Records List and Associated Tools

The left-hand section of the **Item Management** window contains the **Item Records List** pane, where all titles matching an operator's **Find** (Cmnd/Ctrl+F) query will be displayed in the user-specified **Sort By** selection (defined from the **Item Selection** window). Highlighting/selecting an entry in the **Item Records List** will make that record current in the right-hand section of the **Item Management** window.

The area at the bottom of the record list field contains several **Tools** icons that are used for adding, removing, browsing, and finding item records *(for more information, please review the "Item Management Window in More Detail" section of Alexandria's Online Help)*.



Current Item Record Pane

The right-hand section of the **Item Management** window displays full record details for the item selected from the list on the left.

The top of the current item record pane is for displaying status information: **Save** and **Revert**, the **Online Help** icon, the **Lock/Unlock** icon and a secondary **Actions** menu which contains functions specific/unique to the current record.

Unlock/Lock Icon—When the **Item Management** window is opened, the default state of the lock icon is usually "locked". When locked, records can be viewed but not edited. Clicking on the lock icon unlocks the window; it stays unlocked until the operator clicks on the lock icon again or the window is closed.

Actions—This gear/cog menu contains record-specific actions and other tools that don't fit as well with the **Add**, **Remove**, and **Find** functions offered in the primary **Records List Actions** menu *(please review the "Item Management Window in More Detail" section of Alexandria's Online Help)*.

Online Help—This button opens your default web browser to the **Item Management** section of Alexandria's Online Help.

The top of the **Current Item Record** pane contains the **Call Number**, **Policy**, and **Title** for each item record. This portion of the **Item Management** window is always visible regardless if you have the **Title Information** or **Copy Information** tab selected.

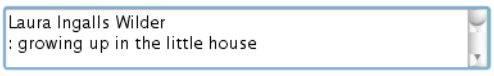
The fields that top the **Items** window are as follows:

- **Title—**A title is required; the record can not be saved until title information has been provided. The title is saved under MARC field **245_a**.

  If you enter a title that is longer than the line, the text wraps to the next field. To enter a subtitle, press `<return>` on the keyboard and enter a colon (" : ") followed by the subtitle. When you save the record, the title is displayed with the colon and subtitle on the second line. This is saved under MARC field **245_a**.

  You can also use the equals sign ("=") in the **245_b** tag to designate a subtitle. However, the ("=") is mainly for multilingual titles.

  For example:



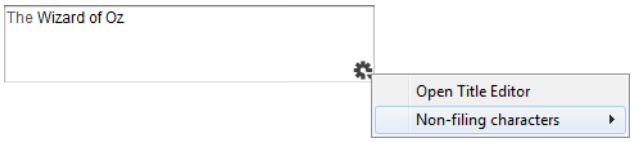
If you want to continue manually entering or editing MARC information in the **Title** field, you can enter statements of responsibility and general material designation. Begin a statement of responsibility (**245_c**) with a front slash ("/") and enclose the medium in brackets ("[]"). All subfield information must begin on a new line in the **Title** field.

If you enter a medium, it will be saved to the **Medium** drop-down menu; it will not be shown in the title field.

If you enter a statement of responsibility, and the **Show Statement of Responsibility in the Title Field of the Items Window** preference is set to *not* show this (i.e. unchecked), it *will* be saved in the **Title** field of the **Item Management** window, but not displayed.

Or, if you enter title information and then <option-tab> (Macintosh) or <ctrl-tab> (Windows) out of the **Title** field (or if you have **Authority Control** enabled), an **Authority Control Title Search** window will appear, allowing you to check if the title is already properly tagged in your collection. If the title is recognized, the **Authority Control** window will not appear.

The **Actions** menu in the **Title** field contains the **Non-Filing Characters** (**Indicator 2**) selection for digits 0-9; use this to specify the number of leading characters to ignore when indexing the title. Thus, the title *The Wizard of Oz* should have "4" selected so the book is sorted (indexed) as "Wizard of Oz". The final character to ignore must be either a blank space or punctuation character. If this indicator is set incorrectly, Alexandria will revert the **Non-Filing Characters** setting to "0" rather than ignore a partial word.



- **Call Number—**Each title is assigned a call number. The call number designates the location of an item in your library. Because call numbers are site-specific rather than universal (such as LCCN or ISBN), you must enter call numbers that are specific to your library. The call number is saved in MARC field **900_a**.

  Depending on their origin, imported MARC records may or may not include call numbers for your items. Alexandria formats call numbers to remove control characters and double spaces, thus repairing incorrectly formatted numbers.

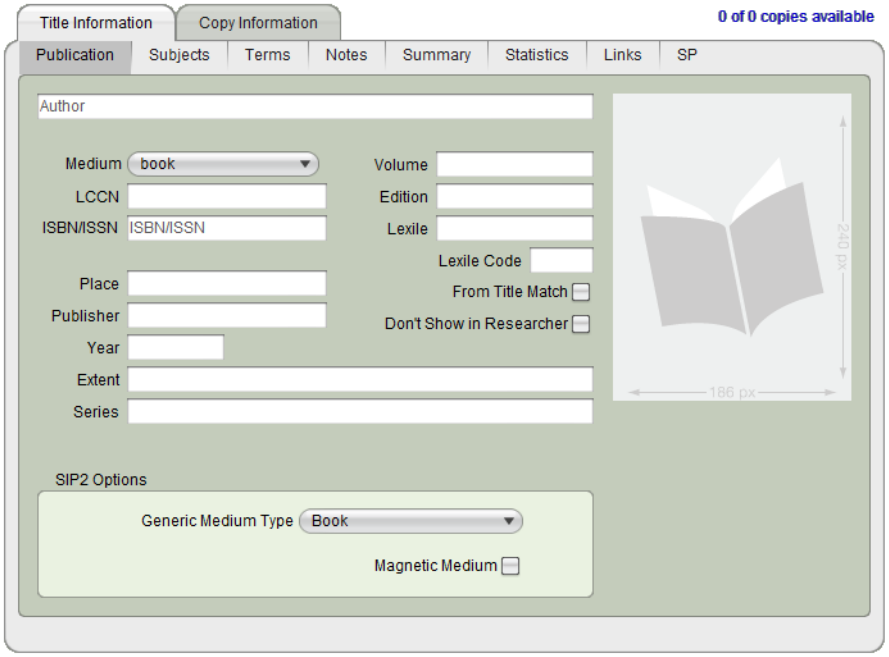
  Copies "inherit" their title call number unless a specific copy call number is exclusively changed.

- **Policy—**Every title is assigned a policy; these policies determine the circulation rules that govern a particular group of items. In addition to enforcing circulation rules, a policy is used to group items for statistical analyses and reporting purposes.

  Copies "inherit" the title policy unless a specific policy is exclusively assigned.

Current Record Tabs and Subtabs

The largest section of the current record pane consists of the **Title Information** and **Copy Information** tabs and related subtabs; these tabs contain the editable fields, drop-down menus, and checkboxes that are essential to managing the assets in your collection.



For a more comprehensive description, please review the "Title Information" and "Copy Information" sections of Alexandria's Online Help.

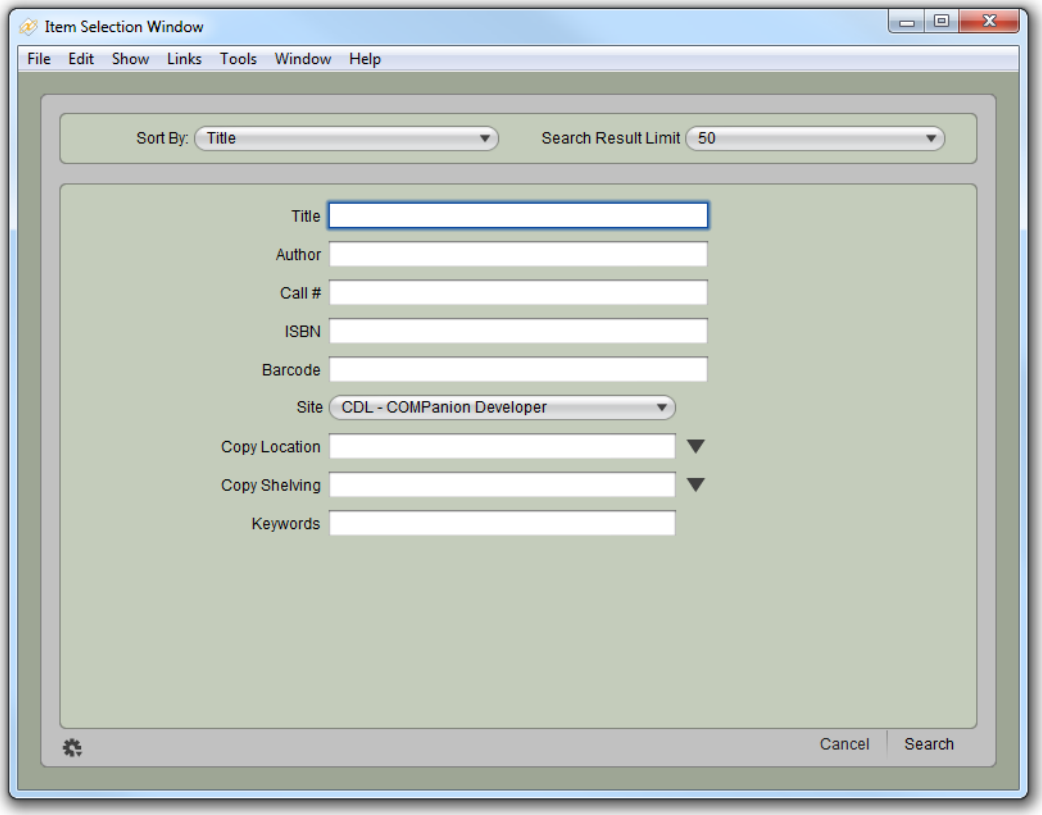
- **Title Information—**The **Title Information** tab and related subtabs allow you to view or edit the standard, commonly shared elements for each title record.
- **Copy Information—**The **Copy Information** tab and related subtabs allow you to view or edit the contents of each individual copy associated with a title.

  You cannot view or edit information in the **Copy Information** tabs until the primary **Title Information** (i.e. title record) has been saved.

Finding Items

The **Find** (Cmnd/Ctrl+F) command under the primary **Actions** menu—or magnifying glass icon—opens the **Item Selection** window, used to locate specific items in your database. For example, if you are looking for a title starting with the word "`Wizard`," every item that closely (or exactly) matches that title will be selected (in alphabetical order) for the **Item Records List** of the **Item Management** window; the item placed at the top of the list is selected as the **Current Item**.

Change the selection in the **Sort By** drop-down menu to choose to search other fields. Click the arrows at the end of fields to choose to search for an item that starts with (or exactly matches) the information you enter. If no record can be located, there will be an audible alert and the current record will not be changed



The **Sort By** drop-down menu allows you to select *where* to search for the data (i.e. **Title**, **Author**, **ISBN**, **Barcode**, **Site**, etc) and determines *how* the results are sorted in the **Item Records List**.

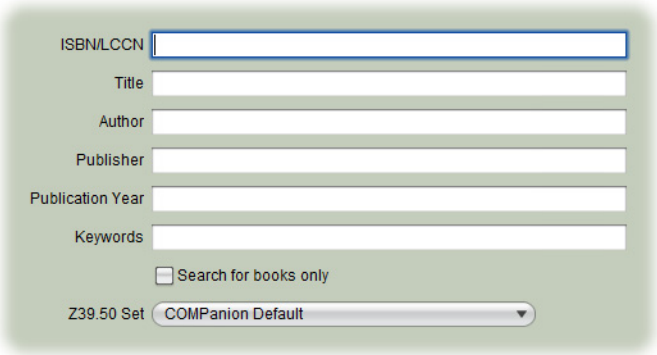
The **Search Result Limit** drop-down menu allows you to limit the number of results returned on your **Find**; you can choose between **50** (default), **200**, **500**, **1000**, **2000**; or, you may choose *not* to limit your results and have **All Records** returned.

Click the **Search** button to locate the record or click the **Cancel** button to close the **Item Selection** window and return to the most recent item record. If a **Search** is performed, the **Item Records List** in the **Item Management** window is populated with results and automatically set to the same selection as the **Sort By** drop-down menu of the **Item Selection** window.

Adding Titles and Copies

Use the **New Record** (Cmnd/Ctrl+N) command, ("**+**") button, or corresponding selection from the primary **Actions** menu to add records to your Alexandria database.

When you select this command, the **Title Assistant** window will appear—prompting you for title information. Make sure to provide at least some of the following title information: **Title**, **Author**, and **ISBN/LCCN**.



The **Title Assistant** will search the internet for MARC records matching your information. See Alexandria's Online Help for more information on how to use the **Title Assistant** window.

Once the process is complete and you've selected the closet match, the **Item Management** window will appear. Provide essential information by typing over the grayed-out (watermarked) data entry fields in the window (such as **Title**, **Author**, and so forth) to add a new record.

You can add local information such as call number (tag **852_h**), barcode number (tag **852_p**), price (tag **852_9**), special funds (tag **852_1**), and volume (tag **092_v**) to your MARC records.

To move to the next blank data entry field, drop-down menu, or button, press the `<tab>` key; to move to the previous one, press `<shift-tab>`. To edit information in a particular data entry field, click in the associated field. To change a selection in a drop-down menu using only your keyboard, use the `<up>` and `<down>` arrow keys when the drop-down menu is focus-outlined. When a button is focus-outlined and you wish to perform that action, press the `<spacebar>`.

When you enter *any* type of specially-formatted information such as dates, phone numbers, or social security numbers, you can enter values in a wide range of formats. For example, you can enter the date of December 1, 2016 as: "`Dec 1, 2016`" or "`12/1/16`" or "`12.1.16`" or "`12 1 16`". If using the current year, you can just enter "`12/1`". If the current month is December, you can just enter "`1`"[1].

1.When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 2031-2099.

Step-by-Step: Create Title Record

The minimum requirement for new titles are: **Title**, **Barcode**, **Medium**, and **Policy**. Of these fields, *all* but **Title** are defaulted; titles may be added with or without copies.

To add a title record:

Step 1. Choose **Items** (Cmnd/Ctrl+I) from the **Show** drop-down menu.

Step 2. Press the **Add Record** ("**+**") button or choose **New Record** (Cmnd/Ctrl+N) from the primary **Actions** menu (located below the **Item Records List**).

Step 3. When you select this command, the **Title Assistant** window will appear—prompting you for title information. Make sure to provide at least some of the following title information: **Title**, **Author**, or **ISBN/LCCN**.

Step 4. The **Title Assistant** will search the internet for MARC records matching your information *(see Alexandria's Online Help for more information on how to use the **Title Assistant** window)*.

Step 5. Once the process is complete and you've selected the closet match, the **Item Management** window will appear.

Step 6. Provide or change essential information by typing over the grayed-out (watermarked) data entry fields in the window (such as **Title**, **Author**, **Call Number**, **Policy**, and so forth) to add a new title record.

Step 7. Make sure to change the **Title**, **Call Number**, and **Policy** if appropriate.

Step 8. In the **Title Information** tab, provide the necessary information in the **Publication**, **Subjects**, **Terms**, **Notes**, **Summary**, **Statistics**, **Links**, and **Study Programs** tabs.

Step 9. When all the appropriate information has been supplied, click **Save** in the upper-right corner of the window to save the record. If you want to discard the information you have just provided, click **Revert** and the previously saved record information will be restored.

Step 10. If you try to close the window without saving your changes, a warning message will appear, asking if you'd like to **Discard** or **Cancel**. If you click on **Cancel**, you'll return to the previous window with your newly-entered information still intact. Click the **Discard** button if you want to abandon the data you just entered. Otherwise, click the **Save** button to save your input.

Step-by-Step: Add Copies

To add a copy:

Step 1. Locate the main title record *(see page 240 to find out how)* for which you would like to add a new copy.

Step 2. In order to add new copies to the current title, select **Add Copy** (Cmnd/Ctrl+Y) from the secondary **Actions** menu (located above the **Current Item Record Pane**) to open a blank **Copy Information** tab. Remember, copies are part of the title record and can *not* be added until the main title record has been saved.

Step 3. Provide the necessary information in the **Copy Info**, **Copy Notes**, or **Copy Stats** tabs. The only field *required* for new copies (i.e. a copy added to a title) is **Barcode**. All others will be supplied by Alexandria; these defaults may later be changed.

Step 4. When you have provided all the necessary information for your copy, click **Save** in the upper-right corner of the main **Item Management** window. If you want to discard the information you have entered, click the **Revert** button.

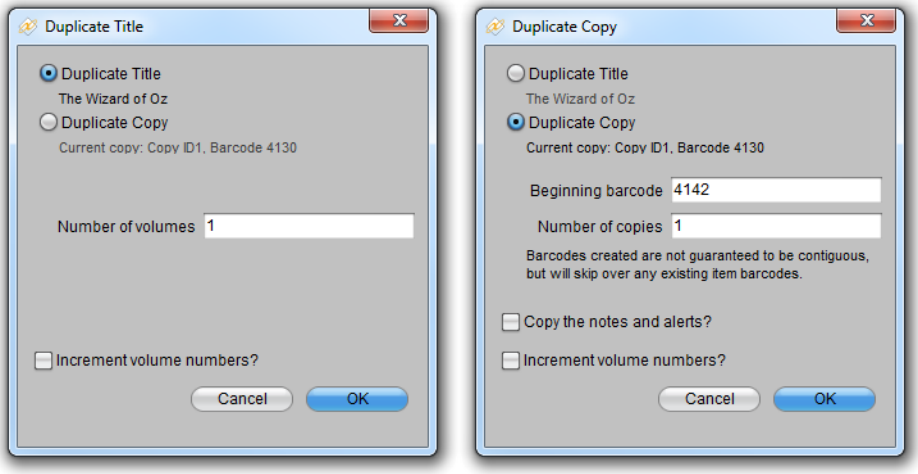
Step 5. Add as many additional copies as you desire, clicking **Save** after each one.

See Alexandria's Online Help for more information on the **Copy Information** tabs and subtabs.

Duplicating Titles or Copies

Use the **Duplicate** (Cmnd/Ctrl+D) command or selection from the primary **Actions** menu to make duplicates of existing titles. You can then modify information for the freshly duplicated title. This saves valuable data entry time when adding new items with similar information (such as author, publisher, or series).

After choosing to **Duplicate** the selected title, the **Duplicate Title/Copy** window appears.



Select whether to add a **Duplicate Title** or **Duplicate Copy**. Be sure to supply correct information for your newly duplicated title/copy. If you forget to modify a field, it will retain that information from the record that was duplicated.

Step-by-Step: Duplicate Titles

To duplicate a title:

Step 1. Select **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Choose **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon in the **Tools** section below the **Item Records List**—to locate the title using the **Item Selection** window.

Step 3. Once the desired title has been found, it will appear in the **Current Item Record** pane.

Step 4. Click on the **Title Information** tab.

Step 5. Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock** (Cmnd/Ctrl+U) from the secondary **Actions** menu.

Step 6. Choose **Duplicate** (Cmnd/Ctrl+D) from the primary or secondary **Actions** menu.

Step 7. Mark the radio button next to **Duplicate Title**.

Step 8. Enter the **Number of volumes** to add if the title you are duplicating has more than one volume; each additional title will be assigned a new volume number.

Step 9. Choose whether you would like to increment the volume number as you duplicate titles (e.g. *The Works of Edgar Allan Poe - Volume III* to *The Works of Edgar Allan Poe - Volume IV)*.

Step 10. Finally, click **OK**. You will be shown the progress for the record(s) being duplicated.

Step 11. When finished, the **Item Management** window will contain your newly-duplicated title(s).

Step 12. If necessary, replace information in the duplicated fields of the **Title Information** tabs to modify your new title.

Step-by-Step: Duplicate Copies

To duplicate a copy:

Step 1. Select **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Choose **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon in the **Tools** section below the **Item Records List**—to locate the title using the **Item Selection** window.

Step 3. Once the desired title has been found, it will appear in the **Current Item Record** pane.

Step 4. Locate the copy that you wish to edit using the left and right arrow icons and **Browse Copies By:** (**Barcode**, **Copy ID**, **Copy Call Number**, or **Copy Sequence Number**) drop-down menu.

Step 5. Once the correct title has been found, it will appear in the **Current Item Record** pane.

Step 6. Click the **Copy Information** tab.

Step 7. Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock** (Cmnd/Ctrl+U) from the secondary **Actions** menu.

Step 8. Choose **Duplicate** (Cmnd/Ctrl+D) from the primary or secondary **Actions** menu.

Step 9. Click the radio button next to **Duplicate Copy**.

Step 10. Choosing **Duplicate Copy** changes the **Number of volumes** field to **Number of copies**. Enter the number of additional copies you need for this title. You can type over this value to change it.

Step 11. If necessary, enter the **Beginning barcode** number. Alexandria automatically defaults the **Beginning barcode** number based on the value you provided in the **Next Barcode** field of the **Items Preferences** *(see page 119)*.

Step 12. Decide if you would also like to duplicate the **Copy Notes** and **Alerts Notes**.

Step 13. Choose whether you would like to increment the volume number as you duplicate copies (e.g. *Encyclopedia Brittanica - Volume 22* to *Encyclopedia Brittanica - Volume 23*).

Step 14. Finally, click **OK**. You will be shown the progress of your copies being duplicated.

Step 15. When finished, the **Item Management** window will contain your newly-duplicated copy (or copies).

Step 16. If necessary, replace information in the duplicated fields of the **Copy Information** tabs to individualize your new copy.

NOTE:
Title records *must* be saved before you can view or modify copy information.

Modifying Titles and Copies

You can edit record information directly from the **Item Management** window or in any of the tabs contained within. For example, you can place your cursor in a field with an existing value and provide additional information. You can also select (highlight) the entire value and replace it by typing over it. Before records can be changed, they must be unlocked using the **Unlock** (Cmnd/Ctrl+U) command.

First, you must **Find** (Cmnd/Ctrl+F) the item you would like to modify. To modify record information, click on the **Title/Copy Information** tab(s).

When you have modified all the necessary record information you want, click the **Save** button in the upper-right corner of the window. The record is now saved. If you want to ignore the information you have entered, click **Revert** to discard your changes.

If you try to leave the **Item Management** window without saving your changes, the following warning appears:

Message
The current record has not been saved. Do you wish to save it before viewing another record or window?
Cancel
Discard
Save

Click the **Cancel** button to return to the **Item Management** window with your changes still intact. Click the **Discard** button if you want to ignore all of the information you've entered. Click the **Save** button or <enter> to save your changes.

Step-by-Step: Modify Title

To modify title information:

Step 1. Choose **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Select **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon in the **Tools** section below the **Item Records List**—to locate the title using the **Item Selection** window.

Step 3. Once the desired title has been found, it will appear in the **Current Item Record** pane.

Step 4. Click on the **Title Information** tab.

Step 5. Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock** (Cmnd/Ctrl+U) from the secondary **Actions** menu.

Step 6. Make any desired changes to the fields in the record, moving between **Publication**, **Subjects**, **Terms**, **Notes**, **Summary**, **Statistics**, **Links**, and **Study Programs** tabs.

Step 7. When the appropriate information has been modified, click **Save** in the upper-right corner of the **Item Management** window.

Step-by-Step: Modify Copy

To modify copy information:

Step 1. Choose **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Select **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon in the **Tools** section below the **Item Records List**—to locate the copy using the **Item Selection** window.

Step 3. Once the desired title has been found, it will appear in the **Current Item Record** pane.

Step 4. Click on the **Copy Information** tab.

Step 5. Locate the copy that you wish to edit using the left and right arrow icons and **Browse Copies By:** (**Barcode**, **Copy ID**, **Copy Call Number**, or **Copy Sequence Number**) drop-down menu.

Step 6. Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock** (Cmnd/Ctrl+U) from the secondary **Actions** menu.

Step 7. Make any desired changes to the fields in the record, moving between the **Copy Info**, **Copy Notes**, and **Copy Stats** tabs.

Step 8. When the appropriate information has been modified, click **Save** in the upper-right corner of the **Item Management** window.

Removing Titles and Copies

Items that have been discarded, given to other libraries, sold, or permanently lost must be removed from the system to keep reports and searches from becoming cluttered with obsolete information. However, be certain that the items you are removing should be *permanently* expunged from your collection.

For example, a lost item may eventually be found or returned. In this case, it is better to record those items as **Lost**, **Discarded**, **On Repair**, **Archived**, or **Unknown**. These special statuses allow you to keep track of items that may eventually return to your library *(see "System Patrons" on page 230)*. COMPanion recommends you only remove items that you *know* will never return to your collection.

When a title is removed, all associated information is also removed. A title that has a copy checked out to a patron can *not* be removed. However, copies that are checked out to the **Lost**, **Discarded**, **On Repair**, **On Order**, **Archived**, or **Unknown** patrons *can* be removed.

Use the **Remove Title** ("**—**") button or command (Cmnd/Ctrl+Shift+R) from the primary **Actions** menu to permanently remove the selected/current title and all associated copies.

The **Remove Copy** command is only available when there are copies associated with the main title record. Selecting this option from the secondary **Actions** menu will remove the currently selected copy regardless whether it's lost or available.

- WARNING-

Removing items is *permanent* and can *not* be undone. If you remove an item in error, you will have to re-enter the information or recover it from a backup copy of your data. If you need to report on items that are lost or discarded for the year, you should check those items out to the corresponding "system patron" (*page 230*). Run all necessary reports (such as **Super Summary**) before removing these items. Once they are removed, they are unavailable for any future reports.

Step-by-Step: Remove Title

To remove a title:

Step 1. Select **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Choose **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon in the **Tools** section below the **Item Records List**—to locate the item using the **Item Selection** window.

Step 3. Once the correct title has been found, it will appear in the **Current Item Record** pane.

Step 4. Use the **Remove Record** ("**—**") button or (Cmnd/Ctrl+R), or select **Remove Record** from the primary **Actions** menu.

Step 5. You are asked to verify that you want the title record permanently removed. Click **Remove** to permanently remove the title or **Keep** to prevent the remove request.

Step-by-Step: Remove Copy

To remove a copy:

Step 1. Select **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Choose **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon in the **Tools** section below the **Item Records List**—to locate the copy using the **Item Selection** window.

Step 3. Once the correct title has been found, it will appear in the **Current Item Record** pane.

Step 4. Click on the **Copy Information** tab.

Step 5. Locate the copy that you wish to edit using the left and right arrow icons and **Browse Copies By:** (**Barcode**, **Copy ID**, **Copy Call Number**, or **Copy Sequence Number**) drop-down menu.

Step 6. Select **Remove Copy** (Cmnd/Ctrl+Shift+R) from the secondary **Actions** menu.

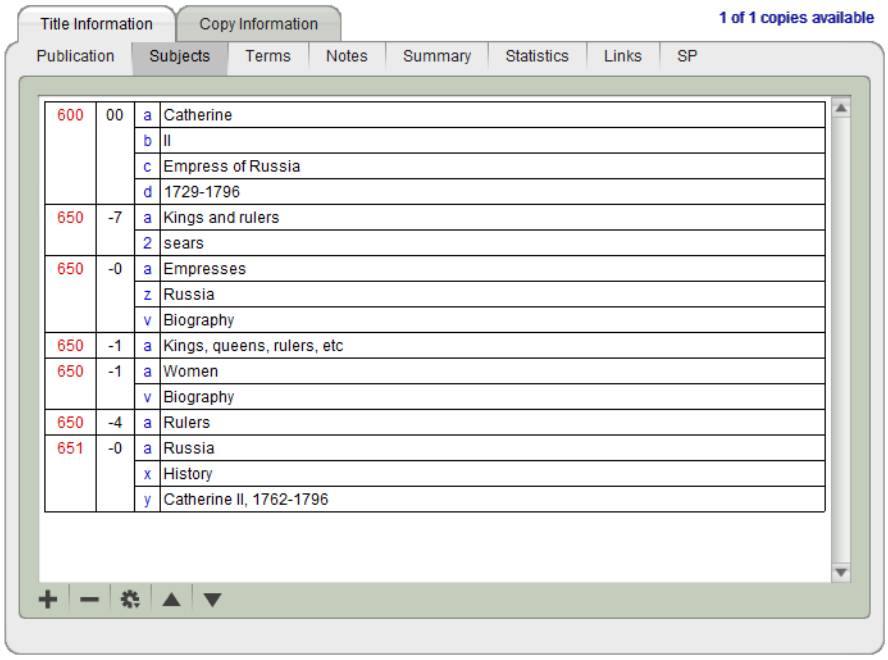
Step 7. You are asked to verify that you want the copy record permanently removed. Click **Remove** to permanently remove the copy or **Keep** to prevent the remove request.

Step 8. Click **Save** in the upper-right corner of the **Item Management** window to save your changes to the main title record.

Title, Author, and Subject MARC Editor

- The **Title** and **Author MARC Editor** windows can be accessed from **Actions** menus which are conveniently located to the right of the respective entry fields (i.e. **Title** and **Author**). Using these editors, you can easily enter multiple, detailed subfields and new tags to any item.

- The **Title Editor** enables you to add uniform titles, etc.
- Use the **Author Editor** to add illustrators, editors, additional authors, translators, and more to the title record.
- The **Subject Editor** subtab under the main **Title Information** tab provides an easy way of adding additional subject tags.

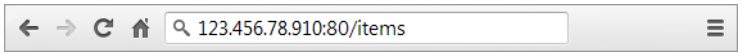


- For more information on the **Title**, **Author**, or **Subject MARC Editor**, please review the corresponding section(s) of Alexandria's Online Help.

Accessing the Online Item Management Window

Along with the **Circulation** "`/circulation`" and **Patron Management** "`/patrons`" windows, Alexandria's **Item Management** window can also be accessed over the web.

To access an online version of your **Patron Management** window, type the IP address (or domain name) and port number of your hosted Data Station (e.g. "`123.456.78.910:80`") followed by "`/items`" into your browser's **Address** field (usually located in the upper-left corner of the window).



If you are not sure what IP address (or domain name) your hosted Data Station uses:

- It appears in the **Transaction Log** of the main **Circulation** window each time your Librarian Workstation is launched; approximately three or four lines down.
- You can locate your IP address under the **Network** header in the **System Info** subtab of the **Special** tab of the **Circulation** window.

If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact COMPanion's Technical Support team at *(800) 347-4942* or through email at `support@companioncorp.com`.

Bookmarking Online Interfaces

For convenience, you can "bookmark" the web addresses of your favorite online modules and add them to your browser's list of **Favorites** for future access. To do this, when you're at the desired web-based interface, click your browser's corresponding **Bookmark** icon. You may also create a shortcut to place on your operating system's desktop, dock, or taskbar. to do this, open up the online module (e.g. **Item Management**), highlight the URL in the **Address** field (or "favicon"[1]) and drag it to your desktop, dock, or taskbar to create a link.

- In a Central Union environment, you can create bookmarks (i.e. links) for specific schools; this is done by including the **Site ID Code** in the web address. For example, if the COMPanion Middle School has an **Site ID Code** of `CMS`, you would enter the URL as: `http://Data Station IP Address:port/#site=CMS`.

1.Favicons are generally little icons found just before the `http://` address in the address bar field of your default internet browser.

Notes:

Patron Management

The **Patron Management** window is where information about the patrons (i.e. students) and operators (employees) who frequent your establishment (site, school, or library) are viewed, created, duplicated, modified, and removed—each belonging to a unique (or identical) security group.

The Patron Management Window In More Detail

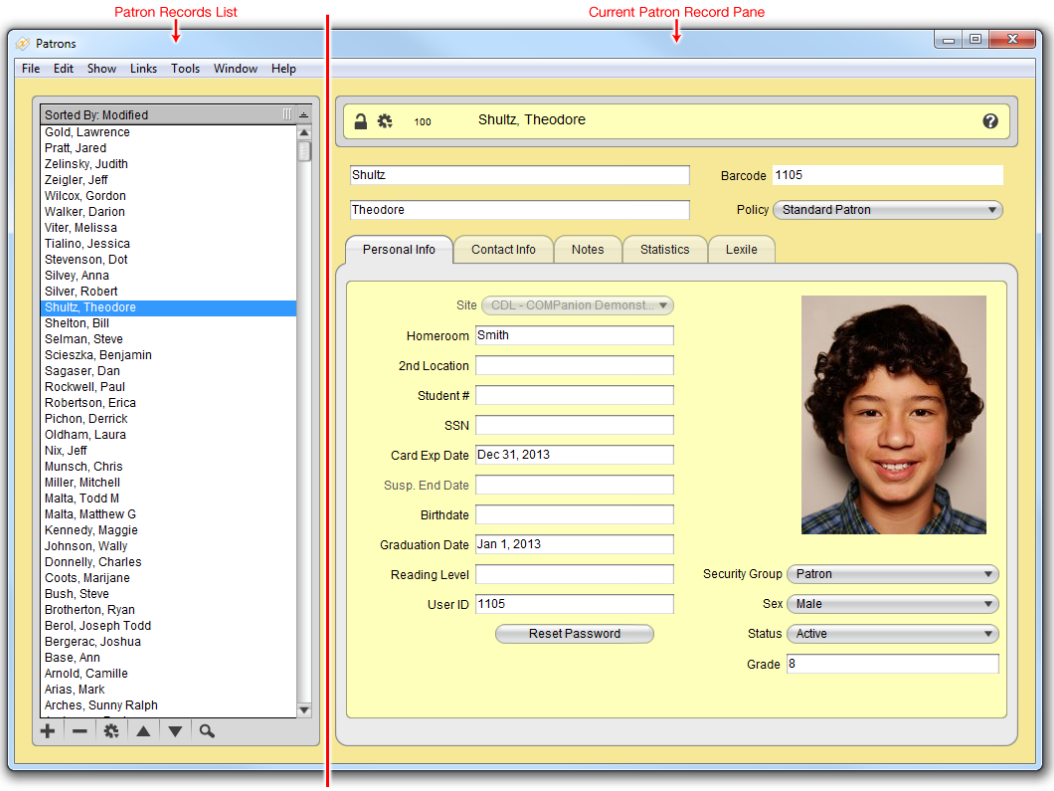
To open the **Patron Management** window, select **Patrons** (Cmnd/Ctrl+L) from the main **Show** menu. When the **Patron Management** window appears, notice that it is comprised of two distinct areas:

Patron Records List

- The left-hand side of the **Patron Management** window belongs to the **Patron Records List**—containing all your patrons and operators listed by name; used also for browsing these records and other related tools. You may select (highlight) any of the names in this field in order to edit their information or remove them completely.

Current Patron Record Pane

- The larger, right-hand portion of the **Patron Management** window consists of the **Current Patron Record** pane where the selected patron (or operator) record is displayed in full, along with associated "tools" that perform operations on said record.



Patron Records List and Associated Tools

The left-hand section of the **Patron Management** window contains the **Patron Records List** where all patron records matching your **Find** (Cmnd/Ctrl+F) criteria are displayed in your specified **Sort By** order *(review the **Patron Selection** window on page 275 for more information)*.

Navigating the Patron Records List

Use the **Patron Records List** to browse through records, starting with the patron or operator that is currently selected (i.e. highlighted).

Selecting a specific patron from the **Patron Records List** will make that record *"current"* in the right-hand section of the **Patron Management** window.

If you need to select a patron record preceding or following the one that is currently highlighted, use the options below to move backwards and forwards through the records:

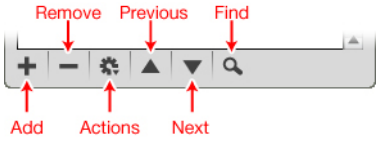
- To move to the previous record, either click on the up arrow icon or choose **Previous** under the **Actions** menu in the tools section of the window. If you prefer using keyboard shortcuts, you can use (Cmnd/Ctrl+]) command.
- To move to the next record, either click on the down arrow icon or choose **Next** under the **Actions** menu in the tools section of the window. If you prefer using keyboard shortcuts, you can use (Cmnd/Ctrl+[ ) command.
- Alternately, use the <up> or <down> keyboard arrow keys to move through the list
- Stop on the patron or operator record that you want to view, remove, duplicate, or modify.

- NOTE-

The behavior of the **Previous** (Cmnd/Ctrl+[ ) and **Next** (Cmnd/Ctrl+]) commands are determined by the record that you are currently viewing. For example, if you change a patron's last name, choosing **Next** will take you *next* last name (in last name order) *after* the *changed* last name—not what the last name was *before* the change.

Tools for the Patron Records List

At the bottom of the **Patron Record List** are several icons that are used for adding, removing, browsing, and finding patron records; for more information, please review the **Patron Management** section of Alexandria's Online Help.

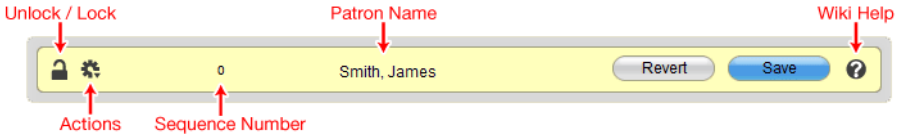


Current Patron Record Pane

The right-hand section of the **Patron Management** window displays the complete details of the patron record selected from the **Patrons Record List** on the left.

The patron/operator record you are presently viewing is called the *"current patron"*. Switching from the **Patron Management** window to the **Circulation** window will make *that* patron *current* in the **Circulation** window as well. If you have a patron current in the **Circulation** window and then open the **Patron Management** window, their record information will be displayed.

At the top of the **Current Patron Record** section is a long, rectangular area used for record status information: **Save**, **Revert**, **Online Help**, **Lock/Unlock**, and a secondary **Actions** menu which contains functions that specifically affect the current record.



Unlock/Lock Icon—Before records can be modified, they must first be unlocked; the default state of the **Patron Management** window is "locked". When locked, records can be viewed but *not* modified; this prevents you (or others) from making unintentional changes to your data. Clicking the **Lock** icon unlocks the window; it stays unlocked until you click the **Lock** icon again or the window is closed.

- To *unlock* a record, click the **Lock** icon at the top-left of the **Patron Management** window or press (Cmnd/Ctrl+M) (on Macintosh/ Windows) until the icon appears unlocked.
- To *lock* a record, click the **Unlock** icon at the top-left of the **Patron Management** window or press (Cmnd/Ctrl+M) (on Macintosh or Windows) until the icon appears locked.

Actions—This menu contains record-specific services and other tools that don't fit as well with the **Add**, **Remove**, and **Find** functions offered in the primary **Actions** menu (of the **Patron Records List**); for more information, please review the **Patron Management** section of Alexandria's Online Help.

Sequence Number—This is a unique number Alexandria assigns to new patrons and operators; useful for browsing patrons by order of entry.

Online Help—This button opens your default web browser to the **Patron Management** section of Alexandria's Online Help.

Current Record Pane (Continued)

The top of the **Current Patron Record** pane (directly below the secondary **Actions** menu area) contains the fields for full patron name, barcode, and policy. This portion of the **Patron Management** window is *always* visible regardless of what tab (e.g. **Personal Info**, **Contact Info**, **Notes**, etc.) you have selected.

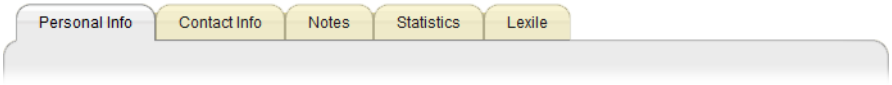
The fields that top the **Current Patron Record** pane of the **Patrons** window are as follows:

- **Patron First & Middle Name—**Enter the first and middle name (or the first name and middle initial) of the patron or operator; for example, "`John Luke`".
- **Patron Last Name—**Enter the patron/operator last name. This field is required, you *cannot* save a patron record without a last name.
- **Patron Barcode—**Each patron (or operator) will be assigned a barcode number that is either supplied by Alexandria or entered manually. This barcode may contain up to 15 digits and *must* be unique. It may contain numbers and/or letters, but *no* punctuation marks or spaces.

  However, if you attempt to manually enter a barcode number that is less than *three* alphanumeric characters, Alexandria will warn you and disable the **Save** feature until you have increased the barcode number. This field is required, you *cannot* save a record without a unique barcode.
- **Patron Policy—**The policy you assign to a patron or operator determines the rules to which they must adhere. By default, the policy for new patrons and operators is **Standard Patron**. However, you can change which policy is automatically assigned by configuring the **Default Policy** setting in the **Patron Defaults** tab of your **Patrons Preferences** *(see "Patrons Defaults tab" on page 113)*.

Current Record Tabs

The largest section of the **Current Patron Record** pane belongs to the **Patron Management** tabs; these tabs contain the editable fields, drop-down menus, and checkboxes that are essential to managing information related to the patrons and operators in your school or district. To bring a particular tab into view, click on the tab header.

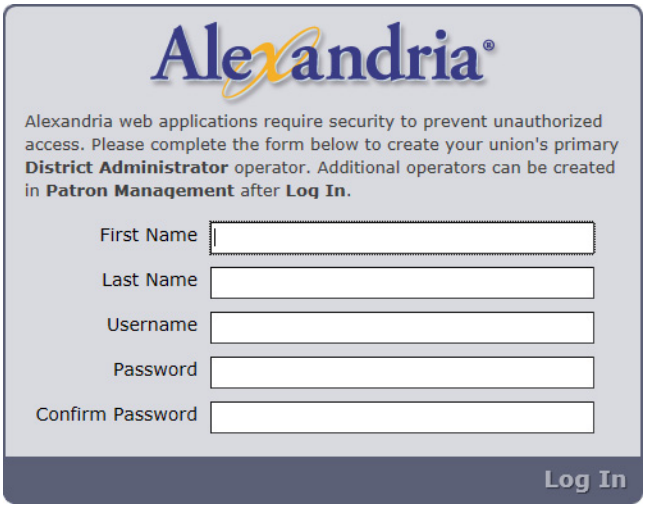


Further information about the contents of these tabs can be found in the *"Patron Management"* section of Alexandria's Online Help.

Alexandria Operators

Access to our software requires that the **Username** and **Password**[1] of a valid operator with the appropriate **Security Group** credentials be entered into the **Log In** window every time the program is launched *(see "Logging In and Activating Security" on page 35)*. Therefore, it is *required* that your very first practical operator be a **District Administrator** with the equivalent **Security Group** access *(page 68)*.

If you haven't yet created a **District Administrator** operator, the first time that you access the program you will be logged in as your union's **System Administrator** (barcode 10); this is a special operator. If the **System Administrator** (barcode 10) has your hosted Data Station's **Serial Number** as its password, the very first time that you attempt to access one of Alexandria's online components[2] (e.g. `/preferences`), you will be tasked with creating a new **Administrator**-level operator; this operator may be edited later.


Alexandria
Alexandria web applications require security to prevent unauthorized access. Please complete the form below to create your union's primary District Administrator operator. Additional operators can be created in Patron Management after Log In.
First Name
Last Name
Username
Password
Confirm Password
Log In

When the **New Operator** window appears in place of the standard **Log In** window, provide your new **District Administrator** operator information: **First Name**, **Last Name**, **Username**, and **Password**[3] (including a standard password confirmation).

Upon completion, the **System Administrator** (barcode 10) password will be changed from the **Serial Number** to a random, cryptographic string. At this point, it's not expected that the **System Administrator** (barcode 10) should ever be used for logging into Alexandria again.

This new **District Administrator**-level operator will be created using the information provided above and then, using these credentials, will be automatically logged into the originally intended destination module.

---

1. If a **Username** or **Password** was not supplied in the **Personal Info** tab during the creation of a new patron/operator, their **Barcode** will be used as the **Username** and their **Last Name** will be used as the **Password** by default.
2. Web-based module or interface component.
3. Provide (and don't forget) the **Username** and **Password** for this operator since they will be required to examine, edit, add, and delete other patrons and operators.

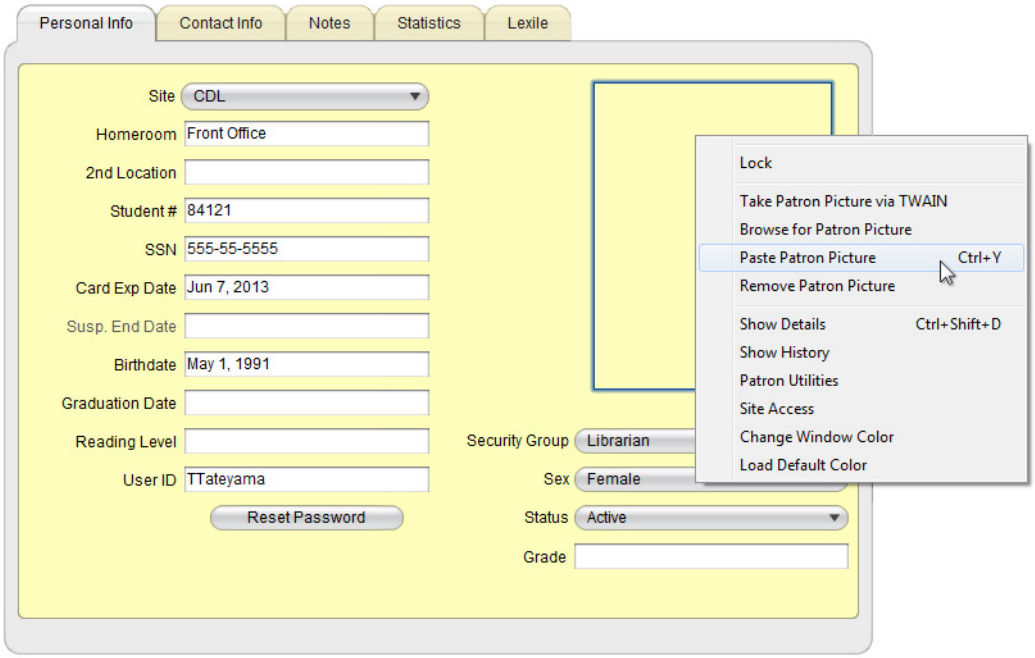
NOTE:
Username and **Passwords** are *not* case sensitive!

Adding Operators

We recommend that the very first operators you create be your **District** and **Library Administrators**. Additional operators can be created in the **Patron Management** window after logging in to Alexandria.

The **District Administrator** security group has access to *all* sites and is really only meaningful for Central Union multi-library collection licenses; for all other licenses, the **District Administrator** security group is analogous to the **Library Administrator**. By default, the **Library Administrator** is assigned to a *single* site; however, this can be adjusted to allow access to additional sites.

Use the **New Record** (Cmnd/Ctrl+N) command, button ("**+**"), or corresponding selection from the primary **Actions** menu to add a new operator to your database. When you use the **New Record** command, a blank **Patron Management** window will appear..

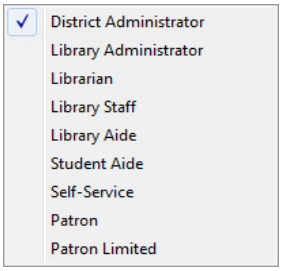


- HINT -

To move to the *next* blank data entry field, drop-down menu, or button, press the `<tab>` key. To move to the *previous* blank data entry field, drop-down menu or button, press `<shift-tab>`. To edit information in a particular data entry field, click in the related field. To change a selection in a drop-down menu using only your keyboard, use the `<up>` and `<down>` arrow keys when the drop-down menu is outlined with a blue focus ring. When a button (e.g. **Lexile Graph**) is outlined and you wish to perform that action, press the `<spacebar>`.

Provide all the necessary and required information (such as first and last name, address, and so forth); make selections from drop-down menus, and check or uncheck boxes in each of the **Current Patron Record** tabs to successfully add a new operator record.

- Since operators *and* patrons are both stored in the database via **Username**[1] and **Barcode** number, it is possible to have patrons *and* operators with duplicate first/last names and **Security Groups**.
- Although only the **Barcode**[2] and **Last Name** fields are required when creating a new operator, we suggest that you provide a unique **Username**[3], **Password**[4], **Email** address, and appropriate **Security Group** level (other than **Patron**).
- If you're in a Central Union, use the **Site Access** selection from the secondary **Actions** drop-down menu to checkmark the sites your operator is permitted to access.
- We also suggest assigning a user-defined **Policy** and **Status**; this is important if you want operator records to appear differently in your statistical reports.
- Except for **Password**[5], **Username**, and **Barcode**, none of this information is defaulted. Alexandria automatically assigns a barcode number based on the **Next Barcode** setting of your **Patrons Preferences** *(see page 113)*.
- Alexandria automatically copies the **City**, **State**, **Postal Code** and **Country** from the address you provided in the **Site Management** window *(see page 41)* for the new operator; they may be manually changed.
- By default, any operator with access to **Security Preferences** will only be able to modify **Security Groups** *below* their own. For example, an operator with **Librarian**-level security access may be allowed to modify preferences, but they are unable to change the **Librarian**, **Library Administrator**, or **District Administrator Security Groups**.
- We *strongly* encourage including pictures of your operator in their patron record; instructions for doing this can be found on page 289.



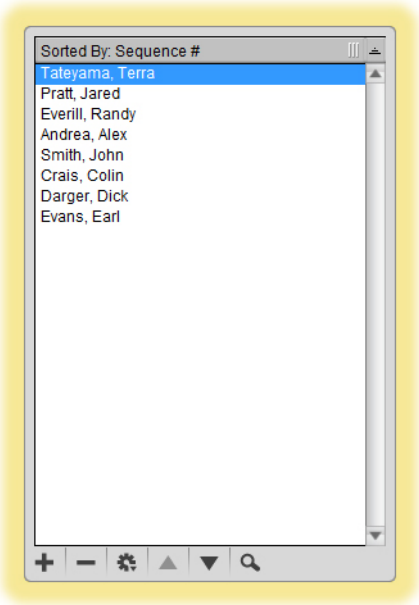
NOTE:
You are initially allowed to select from *these* default operator security groups.

1.**Username**s, however, *must* be unique!
2.When adding *new* operators, the **Next Barcode** value will be used (see page 113).
3. If you choose a **Username** that is already in use, Alexandria will ask you to choose another.
4.Passwords are *not* case sensitive; upper and lowercase characters match. Also, the **Password** field may *not* be left blank.
5.By default, the **Password** will be the operator's last name.

NOTE:
Using the **Data Import** window, you can quickly import *many* operators if you have their data in electronic format.

See page 159 for more information.

Once you have provided the necessary information for your operator, click **Save** in the upper-right corner of the **Patron Management** window. If you want to discard the information you have entered, click **Revert** and the previous patron record will be displayed. Clicking **Save** causes the new operator **Name** to appear in the **Patron Records List** (as shown below).



Near the end of this chapter *(page 291)* you'll find step-by-step instructions on how to *only* view operator records in the **Patron Records List** (as demonstrated in the screenshot above).

Step-by-Step: Adding Operators

To add a new operator record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the main **Show** drop-down menu.

Step 2. The **Patron Management** window will appear.

Step 3. Choose **New Record** (Cmnd/Ctrl+N) from the primary **Actions** menu.

- or -

Click the ("**+**") button located near the bottom of the **Patron Records List**.

- or -

Use the (Cmnd/Ctrl+N) command to add a new operator record to your database.

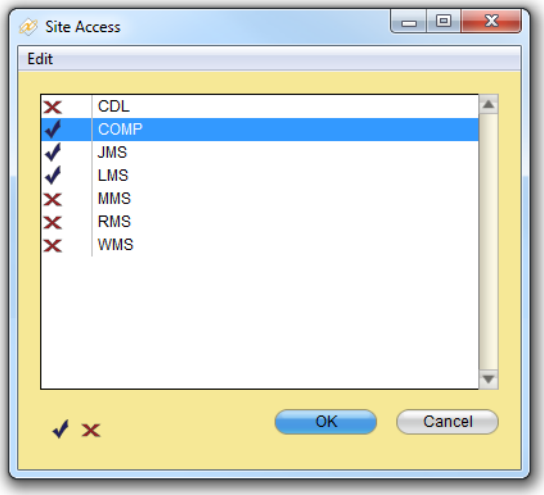
Step 4. A fresh **Current Patron Record** will appear with blank fields, some of which are required in order to save your new operator. Remember, the *very first* operator you create should be a new **District** or **Library Administrator**, overcoming your reliance on the **System Administrator Special Operator** (barcode 10) *(see page 39)*.

Step 5. Move through the **Personal Info** and **Contact Info** tabs, making changes to the operator record as needed. If your new operator is also a patron, you *may* need to supply additional information and configure options in the **Notes**, **Statistics**, and **Lexile** tabs.

Step 6. At the very least, a **Last Name**, **Barcode**, and **Security Group** (other than **Patron**) are *required* to save your new operator. However, we also suggest you provide a unique **Username**, **Password**, and contact **Email** address during the creation of your operator.

Step 7. Additionally, you can contribute your new operator's **Policy**, **Status**, and **Sex**.

Step 8. Next, use the **Site Access** selection from the secondary **Actions** drop-down menu to open the **Site Access** window. Checkmark (by clicking) the sites your new operator is permitted to access.



Step 9. Click **Save** to add your new operator record to the database or **Revert** to discard them.

Duplicating Operators

Use the **Duplicate** (Cmnd/Ctrl+D) command (or selection from the primary **Actions** drop-down menu) to make a copy of an existing operator record. You can then modify the duplicated information to create a new operator. This will save time when adding operators that have identical information such as **Location**, **Policy**, **Security Group**, and **Status**.

When you use the **Duplicate** (Cmnd/Ctrl+D) command, the **Current Patron Record** will appear with information copied from the previously selected operator record. Alexandria will have automatically assigned the **Next Barcode** value *(see "Patrons Defaults tab" on page 113)* rather than duplicating the barcode from the original patron record. Replace any existing information in the tabs and fields of the **Patron Management** window with information specific to the newly duplicated operator.

Step-by-Step: Duplicating Operators

To duplicate a operator record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the main **Show** drop-down menu.

Step 2. This opens the **Patron Management** window.

Step 3. From the **Actions** menu, choose **Duplicate Record** (Cmnd/Ctrl+D).

Step 4. The **Current Patron Record** pane will refresh, containing the duplicated operator information except for barcode and statistics.

Step 5. Move through the **Personal Info** and **Contact Info** tabs, making changes to the operator record as needed.

Step 6. Use the drop-down menus to specify **Policy**, **Status**, and **Sex** for the operator.

Step 7. Use the **Notes** tab to add any (optional) operator alerts.

Step 8. When you've finished adjusting information in the duplicated record, click **Save** in the upper-right corner of the **Patron Management** window.

Modifying Operators

Select the name of the operator whose information you want to modify in the **Patron Records List**; doing so shows the record in the **Current Patron Record** pane. From here, you may change any of the operator information fields.

Before operator records can be modified, they must first be unlocked by clicking on the **Lock** icon or by using the **Unlock** (Cmnd/Ctrl+U) command.

Once the record is unlocked, you can edit the **Username**, **Reset Password**, **Email** address, and **Security Group** of *any* existing operator record directly from the **Current Record** tabs of the **Patron Management** window. Similarly to elsewhere in the program, you can either place your cursor in any field with an existing value and provide additional information or replace it completely.

This method of modifying information is best when editing an *individual* operator record; if you want to modify information for *several* operators, use the appropriate **Patron Utilities** *(page 209)*.

Step-by-Step: Modifying Operator Records

To modify an existing operator record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the **Show** drop-down menu.

Step 2. This opens the **Patron Management** window.

Step 3. From the main **Edit** drop-down menu choose **Find** (Cmnd/Ctrl+F).

- or -

Click the **Find** icon located near the bottom of the **Patron Records List** pane.

- or -

Choose **Find** (Cmnd/Ctrl+F) from the primary **Actions** menu.

Step 4. Any of the above will open the **Patron Selection** window.

Step 5. Using the **Patron Selection** window, provide qualifying information about the operator (e.g. **First**/**Last Name** or **Barcode**) and press `<enter>`.

Step 6. If results—multiple or exact—are located for your search, the **Patron Records List** will be populated with operator record(s) sorted by those that most closely match the information you provided.

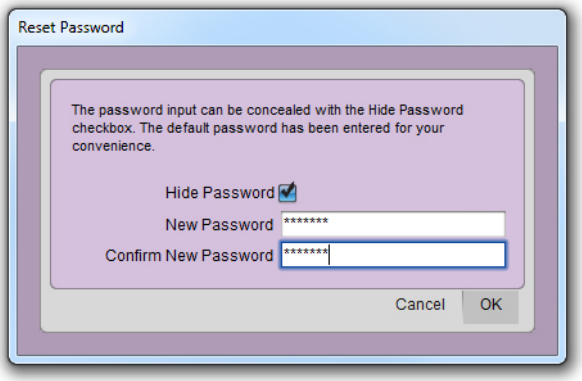
Step 7. Select the name of the operator whose information you want to modify.

Step 8. Unlock the operator record by clicking the **Lock** icon or by performing the **Unlock** (Cmnd/Ctrl+U) command.

Step 9. Move through the **Personal Info** and **Contact Info** tabs, making changes to the operator record as needed.

Step 10. You can change the operator's **Username** field; however, if you try to save an operator record with a **Username** that is already in use (e.g. `TTateyama`), an alert will be triggered, prohibiting the change.

Step 11. If needed, click the **Reset Password** button to open the **Reset Password** window. Use the **New Password** and **Confirm New Password** fields to change the operator password; the password is concealed when the **Hide Password** box is checked. The default password (i.e. the operator's **Last Name**) has been entered for your convenience. You can make this password more secure by mixing different types of characters; use uppercase letters along with lowercase letters, numbers and even special characters such as "&" or "%". Click **OK** to save or **Cancel** to abort.


Reset Password
The password input can be concealed with the Hide Password checkbox. The default password has been entered for your convenience.
Hide Password
New Password
Confirm New Password
Cancel
OK

Step 12. You can assign a new security group for the operator using the **Security Group** drop-down menu.

Step 13. In the **Contact Info** tab, you can update the **Email** address for the existing operator.

Step 14. When you have finished modifying your operator information, click **Save** in the upper-right corner of the **Patron Management** window. If you want to discard your changes, click **Revert** to restore the previous record. You won't be able to select another operator record or close the **Patron Management** window until you **Revert** or **Save** your current changes.

Removing Operators

There are times you may need to remove an operator from your system. Removing operators who are no longer active at your library can help to ensure the accuracy of your reports.

- WARNING -
Before you remove *any* patron(s), archive your database! Removing a patron is permanent and *cannot* be undone! If you mistakenly remove a patron, you will have to re-enter all their information from scratch or recover it from an archive of your data.

To permanently remove an operator, select the operator name from the **Patron Records List** and choose **Remove Record** (Cmnd/Cmnd+R) from the primary **Actions** menu or click the **Remove Record** ("**—**") button; when asked to verify the deletion of the operator, choose **Yes**.

As with patrons, when an operator record is removed, all associated operator information is also removed. For example, removing an operator also deletes the history and statistics that operator has accumulated. An operator who has items checked out can *not* be removed until the items have been returned to the library or recorded as **Lost**.

Step-by-Step: Removing Operators

To remove an operator record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the **Show** drop-down menu.

Step 2. This opens the **Patron Management** window.

Step 3. Choose **Find** (Cmnd/Ctrl+F) from the main **Edit** drop-down menu.

- or -

Click the **Find** button located near the bottom of the **Patron Records List** pane.

- or -

Choose **Find** (Cmnd/Ctrl+F) from the primary **Actions** menu.

Step 4. Any of the above will open the **Patron Selection** window.

Step 5. Using the **Patron Selection** window, provide qualifying information about the operator (e.g. **First/Last Name** or **Barcode**) and press `<enter>`.

Step 6. If results—multiple or exact—are located for your search, the **Patron Records List** will be populated with operator record(s) sorted by those that most closely match the information you provided.

Step 7. Select the operator you want to remove from the **Patron Records List**.

Step 8. From the primary **Actions** menu, choose **Remove Record** (Cmnd/Cmnd+R) or click the **Remove Record** button ("**—**").

Step 9. Alexandria will ask you to verify the permanent removal of the selected operator record. Click **Remove** to delete them or **Keep** to retain them in your database.

Step 10. Just like patrons, an operator *cannot* be removed if they have items checked out.

Step 11. Use caution; if an operator has any outstanding fines or charges, removing them will also clear their fines from the system.

NOTE:
Using the **Data Import** window, you can quickly import *many* patrons if you have their data in electronic format.

See page 159 for more information.

Alexandria Patrons

Use the **New Record** (Cmnd/Ctrl+N) command, ("**+**") button, or corresponding selection from the primary **Actions** menu to add a new patron to your database.

When you use the **New Record** command, a blank **Patron Management** window will appear.

Provide all the necessary and required information (such as first and last name, address, and so forth); make selections from drop-down menus, and check or uncheck boxes in each of the **Current Patron Record** tabs.

- Alexandria automatically copies the **City**, **State**, **Postal Code** and **Country** from the address you provided in the **Site Management** window *(see page 41)* for the new patron; they may be manually changed.
- The **Barcode**, **Last Name**, **Policy**, **Status**, and **Password** fields are all required in order to create a new patron record. All of these fields—except for **Password** and **Last Name**—are defaulted[1]. Alexandria automatically assigns a barcode number based on the **Next Barcode** setting of your **Patrons Preferences** *(documented on page 111)*.
- Be sure to assign the appropriate **Policy** so that patrons appear correctly in your statistical reports.
- By default, newly created *patrons* (i.e *not* operators) are assigned the **Patron Security Group** level; this level doesn't allow access to the Data Station **Tools** (i.e. **Administration**, **Preferences**, or **Site Management**, etc.) side of the program.
- When you have provided all of the necessary information for this patron, click **Save** in the upper-right corner of the **Patron Management** window. If you want to discard the information you have entered, click **Revert**.

- HINT -

To move to the *next* blank data entry field, drop-down menu, or button, press the <tab> key. To move to the *previous* blank data entry field, drop-down menu or button, press <shift-tab>. To edit information in a particular data entry field, click in the related field. To change a selection in a drop-down menu using only your keyboard, use the <up> and <down> arrow keys when the drop-down menu is outlined with a blue focus ring. When a button (e.g. **Lexile Graph**) is outlined and you wish to perform that action, press the <spacebar>.

1.The default **Password** is the patron last name.

Step-by-Step: Adding Patrons

To add a patron record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the main **Show** drop-down menu.

Step 2. This opens the **Patron Management** window.

Step 3. Choose **New Record** (Cmnd/Ctrl+N) from the primary **Actions** menu.

- or -

Click the ("**+**") button located near the bottom of the **Patron Records List** pane.

- or -

Use the (Cmnd/Ctrl+N) command to add a new patron record to your database.

Step 4. Move through the **Personal Info**, **Contact Info**, **Notes**, **Statistics**, and **Lexile** tabs, providing information and updating the patron record as needed.

Step 5. Use the drop-down menus to specify **Policy**, **Status**, and **Sex** for the patron.

Step 6. Use the **Notes** tab to add any (optional) patron alerts.

Step 7. When finished, click **Save** in the upper-right corner of the **Patron Management** window.

Duplicating Patrons

Use the **Duplicate** (Cmnd/Ctrl+D) command (or selection from the primary **Actions** drop-down menu) to make a copy of an existing patron. You can then modify information for the newly created patron. This will save valuable data entry time when you are adding patrons that have identical information (such as location, graduation date, policy, and status).

When you use the **Duplicate** (Cmnd/Ctrl+D) command, the **Current Patron Record** pane will appear with information copied from the *previously* selected patron. Alexandria will have automatically assigned the **Next Barcode** *(see "Patrons Preferences" on page 111)* rather than duplicating the barcode from the original patron record. Replace any information in the tabs and fields of the **Patron Management** window with information specific to the newly duplicated patron.

Step-by-Step: Duplicating Patrons

To duplicate a patron record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the main **Show** drop-down menu.

Step 2. This opens the **Patron Management** window.

Step 3. From the primary **Actions** menu, choose **Duplicate Record** (Cmnd/Ctrl+D).

Step 4. The **Current Patron Record** pane will refresh, containing the duplicated patron information except for barcode and statistics.

Step 5. Move through the **Personal Info**, **Contact Info**, **Notes**, **Statistics**, and **Lexile** tabs, making changes to the patron record as needed.

Step 6. Use the drop-down menus to specify **Policy**, **Status**, and **Sex** for the patron.

Step 7. Use the **Notes** tab to add any (optional) patron alerts.

Step 8. When you've finished adjusting information in the duplicated record, click **Save** in the upper-right corner of the **Patron Management** window.

Modifying Patrons

Select the name of the patron whose information you want to modify in the **Patron Records List**; doing so shows the record in the **Current Patron Record** pane. From here, you may change any of the patron information fields.

Before patron records can be modified, they must first be unlocked by clicking on the **Lock** icon or by using the **Unlock** (Cmnd/Ctrl+U) command.

Once the record is unlocked, you can edit the **Username**, **Reset Password**, **Email** address, and **Security Group** of *any* existing patron record directly from the **Current Record** tabs of the **Patron Management** window. Similarly to elsewhere in the program, you can either place your cursor in any field with an existing value and provide additional information or replace it completely.

This method of modifying information is best when editing an *individual* patron record; if you want to modify information for *several* patrons, use the appropriate **Patron Utilities** *(page 209)*.

Step-by-Step: Modifying Patrons

To modify an existing patron record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the **Show** drop-down menu.

Step 2. This opens the **Patron Management** window.

Step 3. From the main **Edit** drop-down menu choose **Find** (Cmnd/Ctrl+F).

- or -

Click the **Find** icon located near the bottom of the **Patron Records List** pane.

- or -

Choose **Find** (Cmnd/Ctrl+F) from the primary **Actions** menu.

Step 4. Any of the above will open the **Patron Selection** window.

Step 5. Using the **Patron Selection** window, provide qualifying information about the patron (e.g. **First**/**Last Name** or **Barcode**) and press `<enter>`.

Step 6. If results—multiple or exact—are located for your search, the **Patron Records List** will be populated with patron record(s) sorted by those that most closely match the information you provided.

Step 7. Select the name of the patron whose information you want to modify.

Step 8. Unlock the patron record by clicking the **Lock** icon or by performing the **Unlock** (Cmnd/Ctrl+U) command.

Step 9. Move through the **Personal Info**, **Contact Info**, **Notes**, **Statistics**, and **Lexile** tabs, making changes to the patron record as needed.

Step 10. When you have finished modifying your patron information, click **Save** in the upper-right corner of the **Patron Management** window. If you want to discard your changes, click **Revert** to restore the previous record. You won't be able to select another patron record or close the **Patron Management** window until you **Revert** or **Save** your current changes.

Step 11. If you try to save a patron record with a barcode that is already in use (e.g., `1001`), an alert will be triggered, prohibiting the change. This alert window will help you to find an unique and unused barcode, enter a different barcode, view the patron with the original barcode, or **Cancel** to return to the patron record with the improper barcode.

Removing Patrons

There are times you may need to remove a patron from your system. Removing patrons who no longer use your library help to ensure the accuracy of your reports.

- WARNING-
Before you remove *any* patron(s), archive your database! Removing a patron is permanent and *cannot* be undone! If you mistakenly remove a patron, you will have to re-enter all their information from scratch or recover it from an archive of your data.

When a patron record is removed, all associated information is also removed. For example, removing a patron also removes any holds or reservations that the patron has pending. A patron with items checked out *cannot* be removed until the items have been returned to the library or recorded as **Lost**.

Step-by-Step: Removing Patrons

To remove a patron record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the **Show** drop-down menu.

Step 2. This opens the **Patron Management** window.

Step 3. Choose **Find** (Cmnd/Ctrl+F) from the main **Edit** drop-down menu.
- or -
Click the **Find** button located near the bottom of the **Patron Records List** pane.
- or -
Choose **Find** (Cmnd/Ctrl+F) from the primary **Actions** menu.

Step 4. Any of the above will open the **Patron Selection** window.

Step 5. Using the **Patron Selection** window, provide qualifying information about the patron (e.g. **First**/**Last Name** or **Barcode**) and press `<enter>`.

Step 6. If results—multiple or exact—are located for your search, the **Patron Records List** will be populated with patron record(s) sorted by those that most closely match the information you provided.

Step 7. Select the patron you want to remove from the **Patron Records List**.

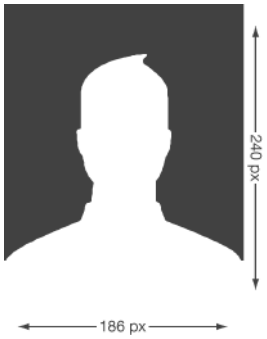
Step 8. From the primary **Actions** menu, choose **Remove Record** (Cmnd/Cmnd+R) or click the **Remove Record** button ("**—**").

Step 9. Alexandria will ask you to verify the permanent removal of the selected patron record. Click **Remove** to delete them or **Keep** to retain them in your database.

Step 10. Patrons *cannot* be removed if they still have items checked out.

Step 11. Use caution; if a patron has any outstanding fines or charges, removing them will also clear their fines from the system.

Adding Patron or Operator Pictures



The optimal size for patron pictures is *240* pixels by *186* pixels at *72* ppi (pixels per inch) resolution.

You can use most standard image files to add patron pictures to the patron record. Some viable picture formats include *GIF*, *BMP*, *PIC*, *PNG*, and *JPG*. Although they can be larger (or smaller), the default, optimal size for patron pictures is *240* pixels by *186* pixels at *72* ppi (pixels per inch) resolution. Larger images will be auto-sized and shrunk to fit within those pixel specifications if they're revealed to be too large upon import.

Although they can also turn up elsewhere (e.g. **Patron Details** and **Patron Reports**), patron pictures primarily appear in the **Current Patron** pane of the main **Circulation** window and the **Patron Management** window's **Personal Info** tab.

When a patron picture is applied to an individual patron record, it will supersede any default patron pictures configured in your **Patron Pictures** preferences *(page 114)*; if the individual patron picture is removed from the record, it will revert back to default.

The two methods described below are best suited when applying one picture at a time to an individual record; if you want to add pictures for a large group of patrons, use the **Import Patron Pictures** functionality *(see page 159)*.

- **Drag and drop—** Drag the patron picture from your operating system desktop into the patron picture field of the **Patron Management** window's **Personal Info** tab. Larger images will be auto-sized and shrunk (or stretched) to fit the *240 x 186* pixel specifications if they're revealed to be too large (or small).

- **Paste and Copy Operator Picture**[1] **—** If you have a picture on your operating system clipboard, the **Paste Patron Picture** (Cmnd/Ctrl+Y) command will paste it into picture field of the **Personal Info** tab

Either method you choose, the operator picture should now appear in the right-hand area of the **Personal Info** tab. For more information on how to locate patrons, browse for picture files on your computer, or paste/remove patron pictures, please review the *"Patron Pictures"* section of Alexandria's Online Help.

1.Windows operators are required to have Apple's QuickTime installed to view some picture formats.

How to Find Patrons and Operators

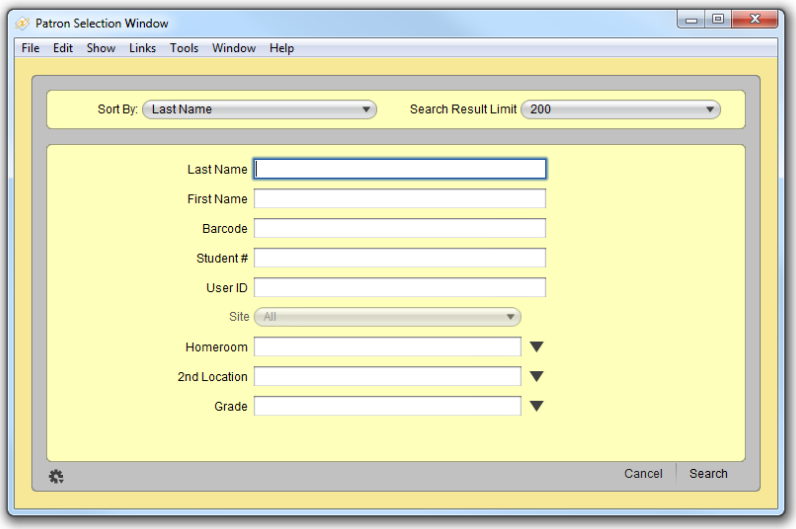
The **Find** (Cmnd/Ctrl+F) command under the primary **Actions** menu—or magnifying glass icon—opens the **Patron Selection** window. This window is used to locate patrons (or operators) in your database that start with (or exactly matches) the information you provide.

For example, if you are looking for a patron with the last name "`Anderson`," every patron record that closely (or exactly) matches that last name will be selected (in alphabetical order) and displayed in the **Patron Records List** of the **Patron Management** window; the patron placed at the top of the list is chosen as the **Current Patron**. If no record can be located, an audible alert will sound and the *current record* will not be changed.

By default, the **Patron Selection** window opens in **Simple** mode; however, an **Advanced** mode *can* be accessed from the window's **Actions** menu. The **Advanced** mode helps to limit and/or expand the scope of your search using boolean selections; adding selections can help return better results. Additional information on the **Advanced** mode of the **Patron Selection** window can be found in the *"Patron Selection Window"* section of Alexandria's Online Help.

Patron Selection Window: Simple

The **Sort By** drop-down menu allows you to specify *what* type of data is searched (e.g. **Last Name**, **First & Middle Name**, **Barcode**, **Student #**, **Site**, etc.) and how it is displayed in the **Patron Management** window once a match (or several matches) are found.



The **Search Result Limit** drop-down menu allows you to limit the number of results returned from your search; you can choose between **50**, **200** (default), **500**, **1000**, **2000**, or choose *not* to limit your results and have **All Records** returned.

Click **Search** to locate records or click **Cancel** to close the **Patron Selection** window and return to the most recent patron record. When a **Search** is successful, the **Patron Records List** in the **Patron Management** window is populated with results and automatically set to the same **Sort By** filter as the **Patron Selection** window.

Step-by-Step: Display Only Operators in the Patron Records List

There are times you may need to *only* show operators in the **Patron Records List**:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the **Show** drop-down menu.

Step 2. This opens the **Patron Management** window.

Step 3. Choose **Find** (Cmnd/Ctrl+F) from the primary **Actions** menu.

- or -

Click the **Find** button located near the bottom of the **Patron Records List** pane.

- or -

From the main **Edit** drop-down menu choose **Find** (Cmnd/Ctrl+F).

Step 4. Any of the above will open the **Patron Selection** window.

Step 5. Select **Advanced** from the **Actions** menu in the bottom-left corner of the **Patron Selection** window; the window will switch to **Advanced** mode.

Step 6. Using the **Select By** drop-down menu, choose **Last Name**.

Step 7. In the associated **Starting With** field, type "A".

Step 8. In the associated **Ending With** field, type "Z".

Step 9. Next, click the **Add Selection** button located near the bottom of the boolean list.

Step 10. Change the boolean operator drop-down menu from **And** to **And Not**; this drop-down menu appears to the left of the **Select By** drop-down menu.

Step 11. Using the **Select By** drop-down menu, choose **Security Group**.

Step 12. From the related selection drop-down menu that appears below, choose **Patron**.

Step 13. Finally, press <enter> or click **Search**.

Step 14. Results for your search will appear in the **Patron Records List** of the **Patron Management** window, containing *only* the operator records (i.e. non-patrons) that exist in your database.

Accessing the Online Patron Management Window

Along with the **Circulation** "`/circulation`" and **Items** "`/items`" management windows, Alexandria's **Patron Management** window can also be accessed over the web.

To access an online version of your **Patron Management** window, type the IP address (or domain name) and port number of your hosted Data Station (e.g. "`123.456.78.910:80`") followed by "`/patrons`" into your browser's **Address** field (usually located in the upper-left corner of the window).

If you are not sure what IP address (or domain name) your hosted Data Station uses:

- It appears in the **Transaction Log** of the main **Circulation** window each time your Librarian Workstation is launched; approximately three or four lines down.
- You can locate your IP address under the **Network** header in the **System Info** subtab of the **Special** tab of the **Circulation** window.
- You can also locate your IP address (or domain name) in the **Admin Web Administration** settings.

If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact COMPanion's Technical Support team at *(800) 347-4942* or through email at `support@companioncorp.com`.

Bookmarking Online Interfaces

For convenience, you can "bookmark" the web addresses of your favorite online modules and add them to your browser's list of **Favorites** for future access. To do this, when you're at the desired web-based interface, click your browser's corresponding **Bookmark** icon. You may also create a shortcut for your operating system's desktop, dock, or taskbar; to do this, open up the online module (e.g. **Patron Management**), highlight the URL in the **Address** field (or "favicon"[1]) and drag it to your desktop, dock, or taskbar to create a link.

In a Central Union environment, you can create bookmarks (i.e. links) for specific schools; this is done by including the **Site ID Code** in the web address. For example, if the COMPanion Middle School has an **Site ID Code** of `CMS`, you would enter the URL as: `http://Data Station IP Address:port/#site=CMS`. Be sure to mind the case-sensitivity of the site code.

1.Favicons are generally little icons found just before the `http://` address in the address bar field of your default internet browser.

Shortcut Keys

Accelerator and Hotkey Commands

Hotkeys—Hotkeys are the underlined characters in a menu item or dialogue box that allow users to access the item or control by pressing that character's key on the keyboard. In the case of dialogue controls, the user may have to hold down the <alt> key before pressing the hotkey. Hotkeys are sometimes referred to as *shortcut* keys, *access* keys, or *mnemonic* keys.

Windows Shortcut Keys

Ctrl+Shift+N	New Document
Ctrl+O	Open
Ctrl+W	Close Window
Ctrl+Alt+W	Close All
Ctrl+S	Save
Ctrl+Shift+S	Save As Text
Ctrl+P	Print
Ctrl+Shift+E	Restart
Ctrl+Shift+E	Log Out
Ctrl+Q	Exit Alexandria
Ctrl+Z	Undo
Ctrl+Shift+Z	Redo
Ctrl+X	Cut
Ctrl+C	Copy
Ctrl+V	Paste
Ctrl+A	Select All
Ctrl+F	Find
Ctrl+G	Find Again
Ctrl+;	Preferences
Ctrl+T	Circulation
Ctrl+I	Item Management
Ctrl+L	Patron Management
Ctrl+K	Researcher
Ctrl+C	Search

Windows Circulation Shortcut Commands

These shortcut commands allow you to quickly perform Circulation actions.

Ctrl+1	Start Bookdrop
Ctrl+2	Make Charges/Payments
Ctrl+3	Show Current Patron Details
Ctrl+4	Remove Current Patron Holds
Ctrl+5	Remove Current Patron Reservations
Ctrl+6	Show Current Item Details
Ctrl+7	Adjust Current Item Holds
Ctrl+8	Remove Copy Reservations
Ctrl+R	Renew Current Patron Items

Accelerator keys—An accelerator key is a keyboard shortcut that is accessed by holding down modifier keys (<shift>, <ctrl>, <alt>, or combinations of these) and pressing another key on the keyboard. Accelerator shortcuts appear to the right of a menu item text.

Macintosh Shortcut Keys

⌘ + H	Hide Alexandria (Carbon)
⌥ + ⌘ +H	Hide Others (Carbon)
⇧ + ⌘ +N	New Document
⌘+O	Open
⌘+W	Close Window
⌥ + ⌘ +W	Close All
⌘+S	Save
⌥ + ⌘ +S	Save As Text
⌘+P	Print
⌥ + ⌘ +P	Print to PDF
⇧ + ⌘ +E	Restart
⌘+Q	Log Out/Quit Alexandria
⌘+Z	Undo
⇧ + ⌘ +Z	Redo
⌘+X	Cut
⌘+C	Copy
⌘+V	Paste
⌘+A	Select All
⌘+F	Find
⌘+G	Find Again
⌘+;	Preferences
⌘+T	Circulation
⌘+I	Item Management
⌘+L	Patron Management
⌘+K	Researcher

Macintosh Circulation Shortcut Commands

These shortcut commands allow you to quickly perform Circulation actions.

⌘+1	Start Bookdrop
⌘+2	Make Charges/Payments
⌘+3	Show Current Patron Details
⌘+4	Remove Current Patron Holds
⌘+5	Remove Current Patron Reservations
⌘+6	Show Current Item Details
⌘+7	Adjust Current Item Holds
⌘+8	Remove Copy Reservations
⌘+R	Renew Current Patron Items

COMPanion®

COMPanion Corporation
1831 Fort Union Boulevard, Salt Lake City, Utah 84121-3041, USA
www.goalexandria.com